Winning the Quick-Commerce Decade: Playbook for Brand Success

September 2025

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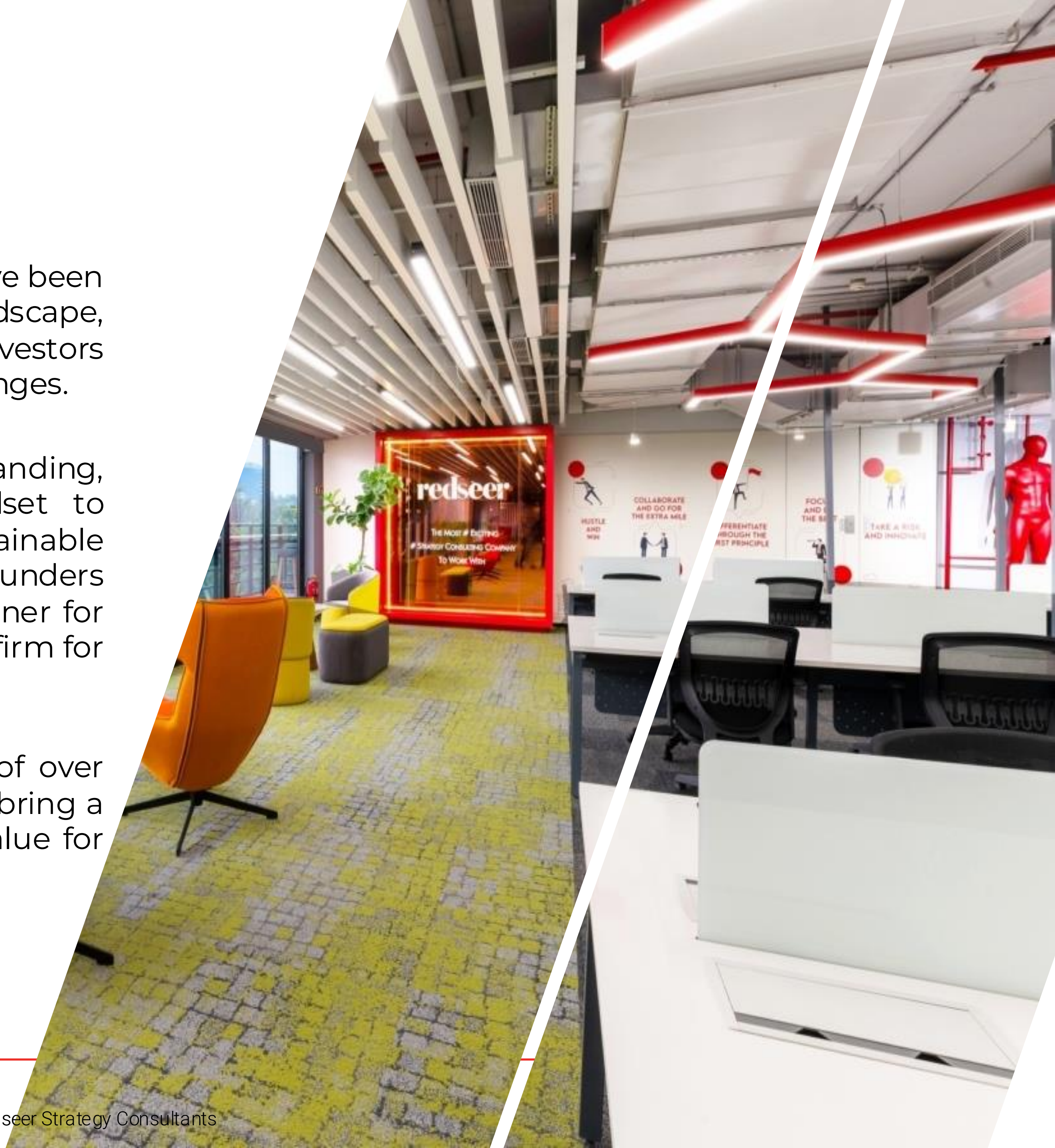
About Redseer Strategy Consultants

We solve the strategy behind scale. For over 15 years, we have been at the forefront of shaping India's new-age business landscape, helping consumer-focused brands, digital platforms, and investors solve their most pressing growth and transformation challenges.

Our advantage lies in combining deep consumer understanding, innovation-first thinking, and an entrepreneurial mindset to deliver strategies that go beyond ideas into scalable, sustainable impact. This has made Redseer the trusted advisor to founders and boards as they build enduring businesses, the #1 partner for IPO strategy among new-age firms, and a leading advisory firm for private equity investors navigating high-stakes decisions.

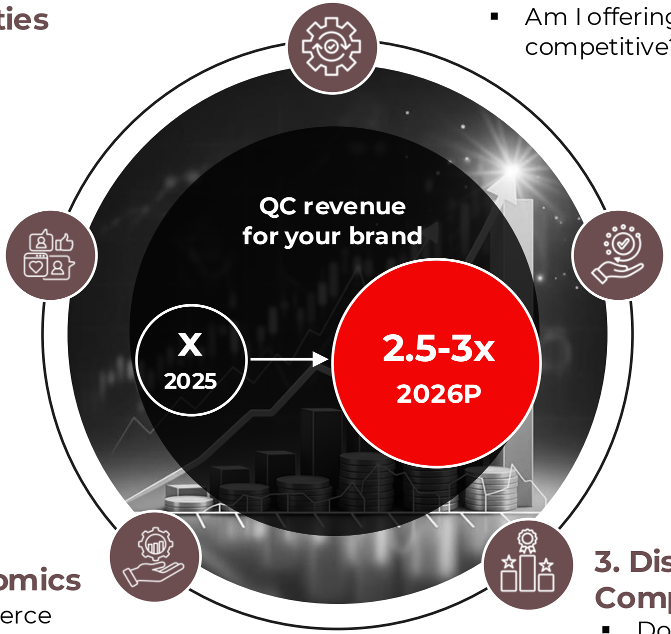
Together with our global partner, OC&C, and a network of over 1,000 consultants across 22 countries and 5 continents, we bring a global perspective with local relevance, creating lasting value for clients as they transition from bold vision to scalable reality.

For more, visit redseer.com



We help brands to power their quick-commerce growth journey

Redseer Framework: Unlocking Revenue Uplift on Quick Commerce



1. Optimizing Assortment

- Is my product assortment aligned with the needs of quick-commerce shoppers?
- Am I offering the right mix to stay competitive?

2. Ensuring Availability

- Is my inventory calibrated to meet the unique demand patterns of quick-commerce — including local micro-markets and time-sensitive peaks?

3. Discoverability & Pricing Competitiveness

- Do my products have enough recall to appear in searches?
- How easily can shoppers find my products when browsing through the key platforms?
- Am I competitively priced across categories and during key demand spikes?

4. Improving Economics

- Are my quick-commerce margins aligned with industry benchmarks?
- How can I optimize promotional, media, and logistics spend to drive efficiency in the quick-commerce channel?

5. Strengthening Capabilities & Platform Engagement

- Are my quick-commerce logistics, supply chain, forecasting, and analytics future-ready for this channel?
- Do I have the talent, systems, and processes to scale quick-commerce seamlessly?
- Am I partnering strategically with quick-commerce platforms—across contracting, planning, and execution?

Our Solutions

Consulting & Advisory Support

Backed by exceptional primary research capabilities, rigorous & detailed approach, and senior team engagement

Benchmarks (Request Access)

Continuous performance measurement across categories, customers, and competitors

Table of contents

Methodology: Primary research supported by Redseer IP

Project Methodology

35+ Industry stakeholder interactions, across different type of stakeholders and categories

01 25+ Brand Discussions

Including national and D2C brands

02 10+ Quick-Commerce Platform Discussions

Including established leaders and emerging players

03 Redseer IP

a. Benchmarks: Redseer's proprietary platform on the India Internet Landscape *(Click to request access)*

b. Insights drawn from continuous strategy engagement with leading brands, investors, and platforms

All estimates stated in this report are based on Redseer's research and IP, unless otherwise specified

Executive summary: Quick-Commerce is growing rapidly into a mainstream distribution channel for brands

Quick Commerce Market Highlights

01 Quick-Commerce to become main-stream

Quick commerce is set to cement itself as a mainstream brand distribution format, projected to contribute

~10% of branded retail by 2030.

02 Grocery, BPC and electronics accessories at the forefront

Its sweet spot lies in small-ticket, impulse-driven purchase missions, especially in categories with a tight SKU range – translating to

10-15% of grocery and 15-20% of BPC spends

being QC-led by the end of the decade.

03 Gen Z's & Millennials from metros' to lead the way

Affluent, big-city Gen Z and millennial shoppers will remain the core monthly transacting base for the next 5–7 years, driving QC to account for

20–25% of D2C brand spends and 1/3rd of total brand spends in metro cities by 2030.

04 Quick- Commerce's distinct DNA demands brand focus

GT/Kirana-like consumer engagement, e-commerce-like brand control, and high-intent /mission-driven consumer journeys, make QC a distinctive channel.

Executive summary: Brands can maximize the potential by unlocking the 8 levers identified as part of our QC success playbook

Redseer's Playbook for Brand Success on Quick Commerce

01 Recalibrate QC identity for today's dynamic consumer trends

- New-age consumption trends are leading the way on QC.
  - Zero sugar beverages: INR 350 Cr.+
  - Dark chocolates: INR 250 Cr.+
- Crucial for brands to align their assortment and product messaging / ad efforts

02 Leverage QC as a launchpad

- New-age brands (Represented By D2C) drive 4x higher share of GMV on QC Vs E-commerce
- Multiple newly launched products have scaled 7-9x on QC last year
- Real-time, granular targeting & insights make QC an effective launch channel.

03 Sharpen the assortment based on micro-market demand

- Distinct micro-market demographics call for tailored assortments
- Limited dark store capacity demands a sharper focus on high-velocity SKUs
- Platforms are advancing to enable micro-optimizations

04 Drive profitability through smart upselling

- Appropriate premiumization and bundling can help unlock higher profitability on QC.
- High QC user orientation towards premium products further aids the action.
- Platforms to continue promoting premium / bundled products to improve economics.

05 Optimize promotional spends as per demand rhythms

- QC demand is highly time sensitive and category specific
- Promotional efforts need to match the demand patterns, while factoring in competitive intensity - what's the golden window for your products?

06 Customize visibility efforts as per category & brand maturity

- Visibility efforts (across search & browse journeys) must align with the brand X category maturity on QC
- Off-platform efforts are critical for insurgents, while on-platform efforts are universally relevant

07 Win spike days with event-led agility

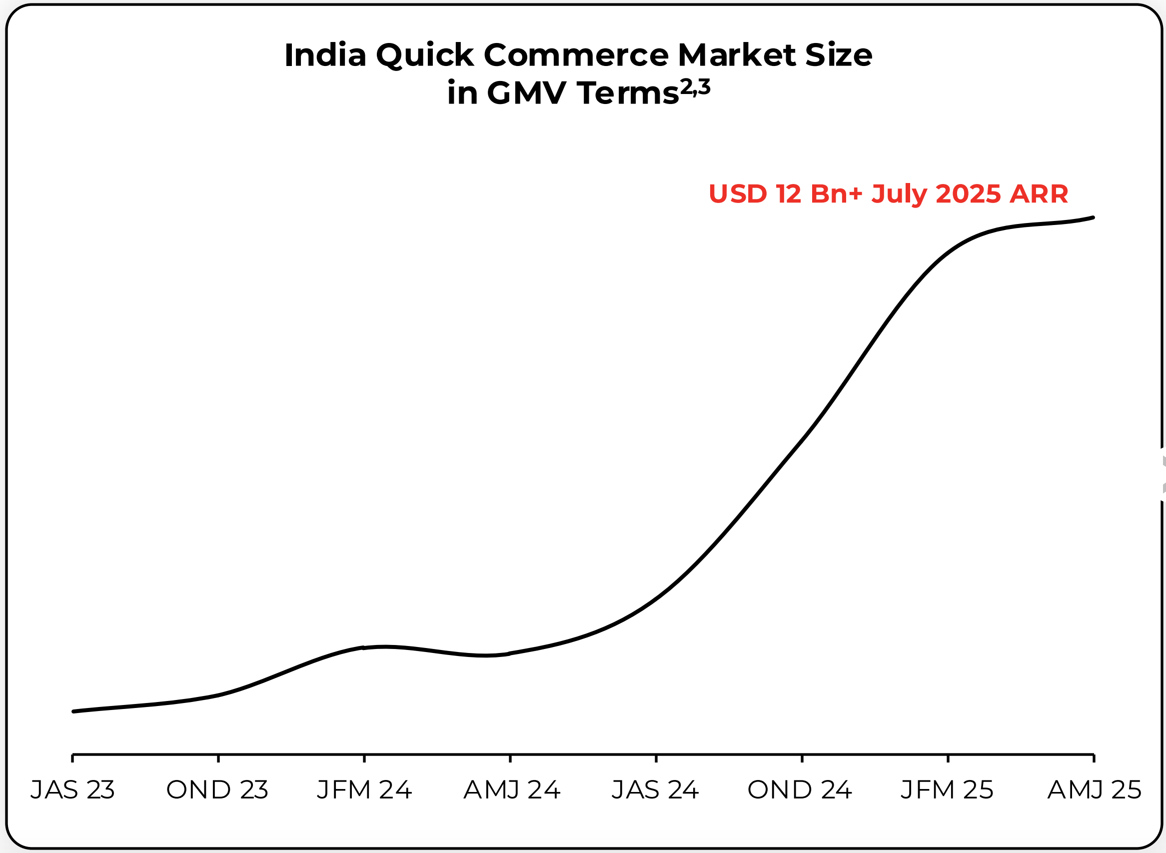
Quick commerce lets brands win small, sudden demand surges through agile, low-effort activations

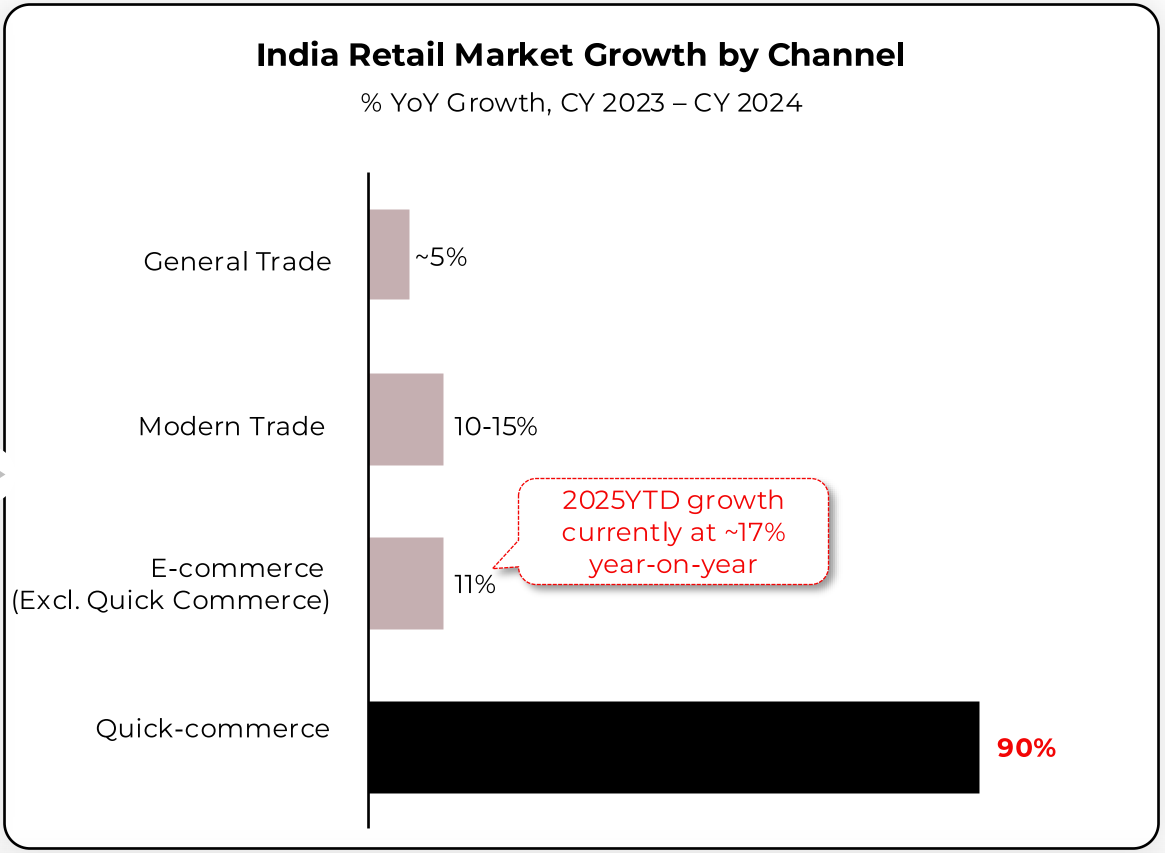
08 Deploy an agile team, paired with responsive supply chain engine

- QC account management is uniquely intense
- Ownership spans multiple functions: platform relationships, catalogue & content, supply chain, and digital marketing.
- Agile supply chain is critical to enable real-time actionability.

Quick-Commerce: from emerging channel to mainstream force

Quick commerce continues to grow rapidly, emerging as the fastest growing retail format in India





Jul-25 KPIs:

33 Mn+	4,800+	150+	75-80%	~80%	~150%
MTUs	Dark Stores	Cities	Metro share	Top 3 platform share	2025YTD growth YoY

Note(s): *1. Conversion Rate: 1 USD = INR 85, 2. Represents aggregated performance across leading platforms – Blinkit, Zepto, Swiggy Instamart, BB Now, Flipkart Minutes, and Jiomart Quick; 3. Gross Merchandise Value (GMV) at Selling Price refers to the total value of goods sold at their selling price (i.e., after any MRP discounts) for all the orders excluding coupon and checkout discounts, delivery charges, and other platform fees. It includes cancelled and returned orders.*

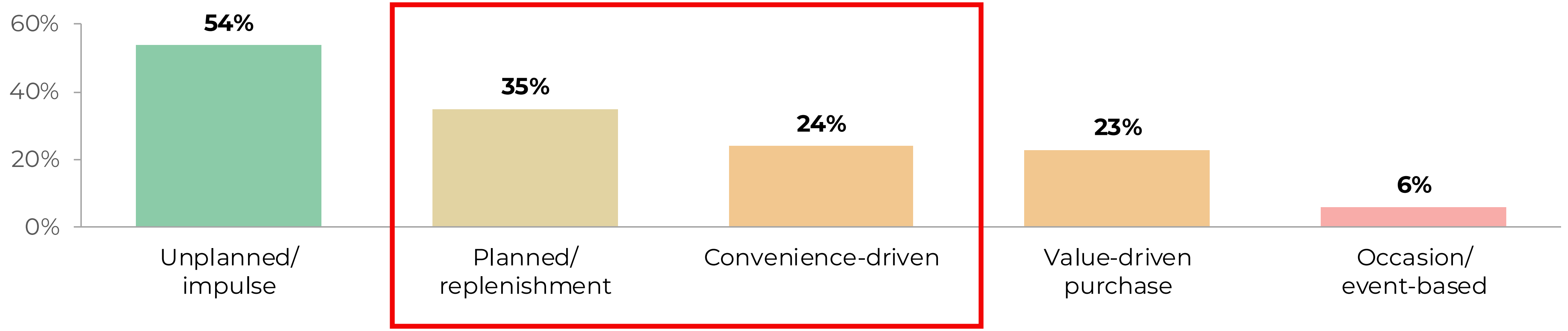
Shoppers are becoming habitual, moving from impulse-driven daily fixes to planned routine top-ups

Quick commerce: Use cases (N=604)

% responses
Low — High

Q: When do you usually use quick commerce platforms to shop for grocery products?

% responses



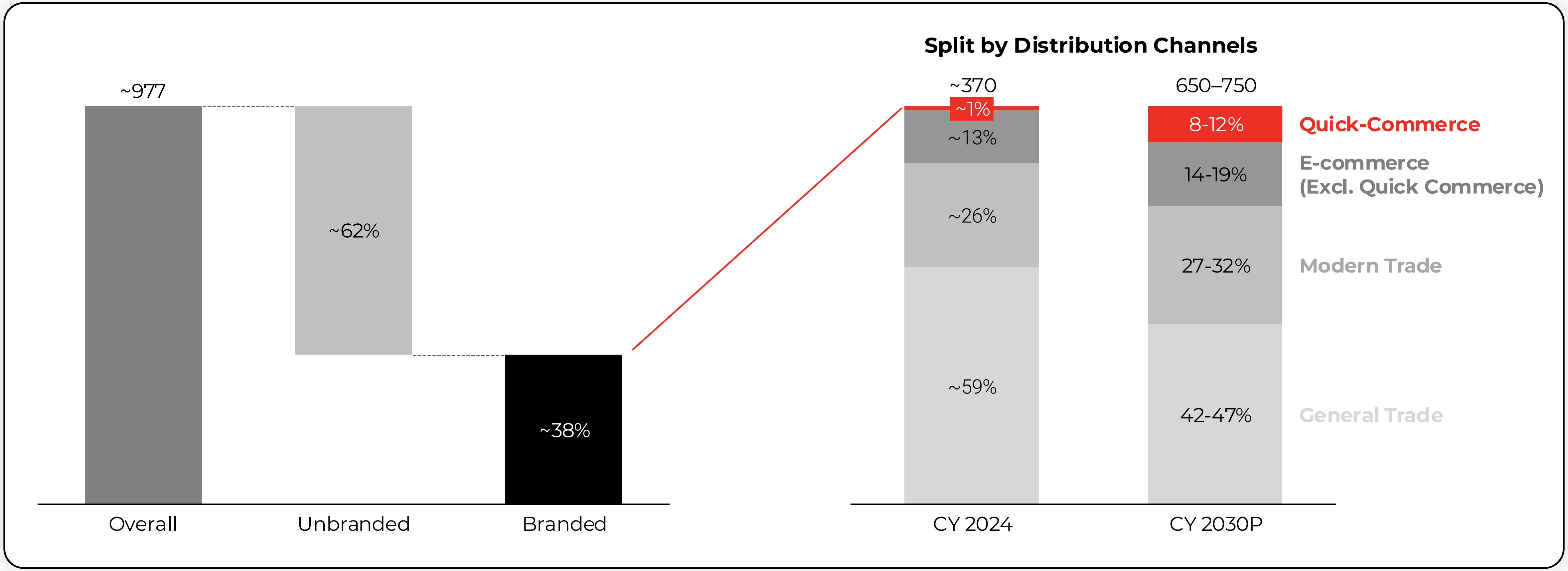
Type of purchase

Actions	Unplanned/ impulse	Planned/ replenishment	Convenience-driven	Value-driven purchase	Occasion/ event-based
Actions	To fulfill urgent or last-minute needs (e.g., cravings, unexpected guests, etc.)	To top up monthly or weekly essentials/restock forgotten or out-of-stock items	To avoid stepping out due to inconvenience (e.g., illness, bad weather, busy schedule)	To buy during sales or special pricing	To purchase for celebrations or social gatherings

~10% of branded spends in India are expected to happen on QC in 2030, making it a mainstream distribution channel for brands

Retail Market Size Split – By Branded & Unbranded

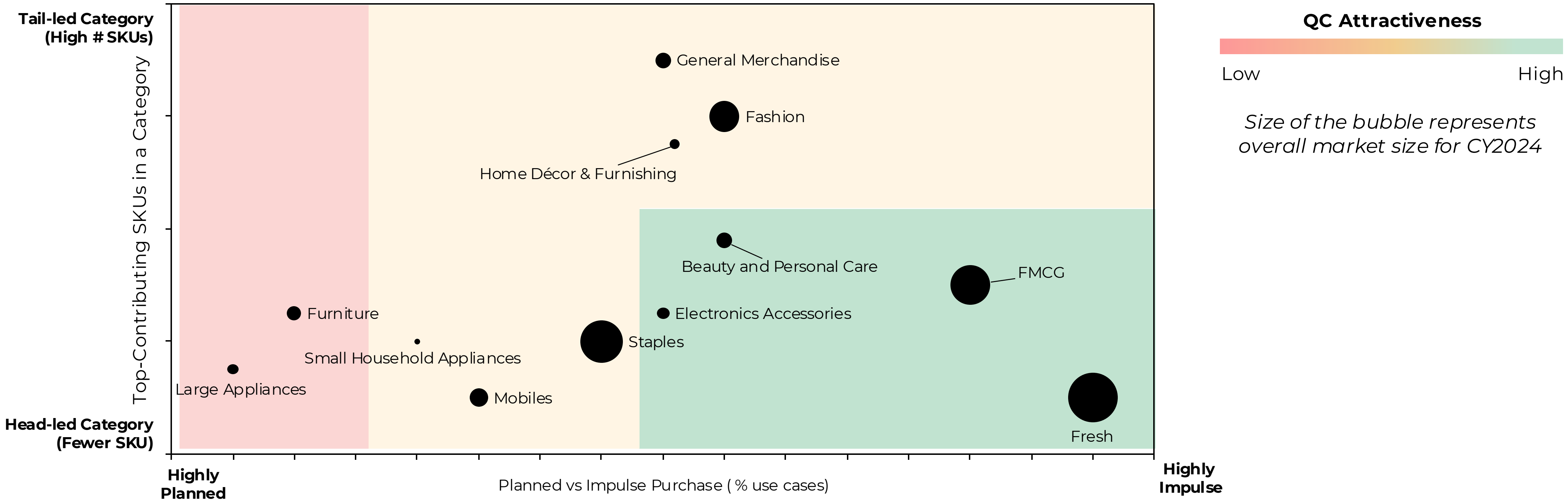
In USD Bn (% share of the overall retail), CY 2024



Note(s): *1. Conversion Rate: 1 USD = INR 85, 2. Branded market comprises products sold by national brands (Pan-India), direct-to-consumer (D2C) brands, and regional brands*

QC emerging as a natural fit for small-ticket product categories (often bought impulsively) with confined SKU range

Quick-Commerce Category Attractiveness

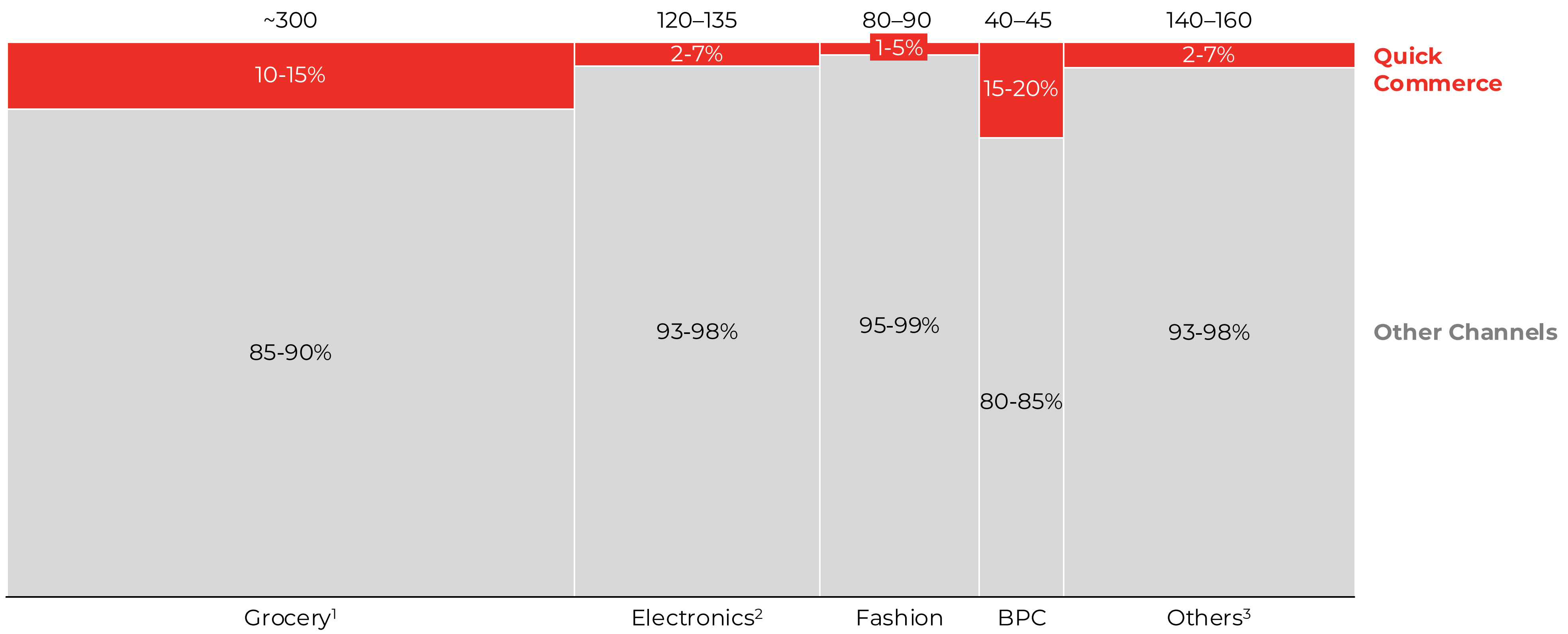


Note(s): *Note(s): 1. Fresh includes fruits, vegetables, meat, seafood, dairy, and other perishables; 2. Staples include grains, pulses, and related essentials; 3. FMCG covers packaged foods, beverages, toiletries, and cleaning supplies (excludes personal care and baby care consumables); 4. Beauty and Personal Care comprises makeup, hair care, skin care, fragrances, personal hygiene, oral care, and deodorants; 5. Large Appliances include refrigerators, washing machines, ACs, TVs, home entertainment systems, etc.; 6. Small Household Appliances cover water heaters, vacuum cleaners, air purifiers, ironing/heating devices, kitchen & cooking appliances, and personal care gadgets; 7. Electronic Accessories include mobile covers, screen protectors, chargers, cables, headphones, adapters, smartwatches, and batteries; 8. Fashion consists of apparel, footwear, and accessories like belts, bags, watches, hair accessories, wallets, wearables, scarves, stoles, caps, and hats; 9. Furniture includes core household furniture such as beds, sofas, wardrobes, dining tables, chairs, study/work desks, storage units, and cabinets.; 10. Home Décor and Furnishing include home textiles and décor items including curtains, carpets, rugs, cushions, bedding, mattresses, wall décor, lighting, decorative pieces, kitchenware, and tableware; 11. General Merchandise comprises toys, baby care products, stationery, and office supplies.*

Within the branded segment, 10-15% grocery and 15-20% BPC are projected to be QC-led by 2030

Branded Retail Market Size Split – By Category and Channels

In USD Bn (% share of branded retail), CY 2030P



Note(s): *1. Grocery includes FMCG, Fresh and Staples. 2. Electronics include Mobiles, Electronic Accessories, Large and Small Appliances. 3. Others include General Merchandise, Home & Furniture, Pharma, Jewellery, etc.*

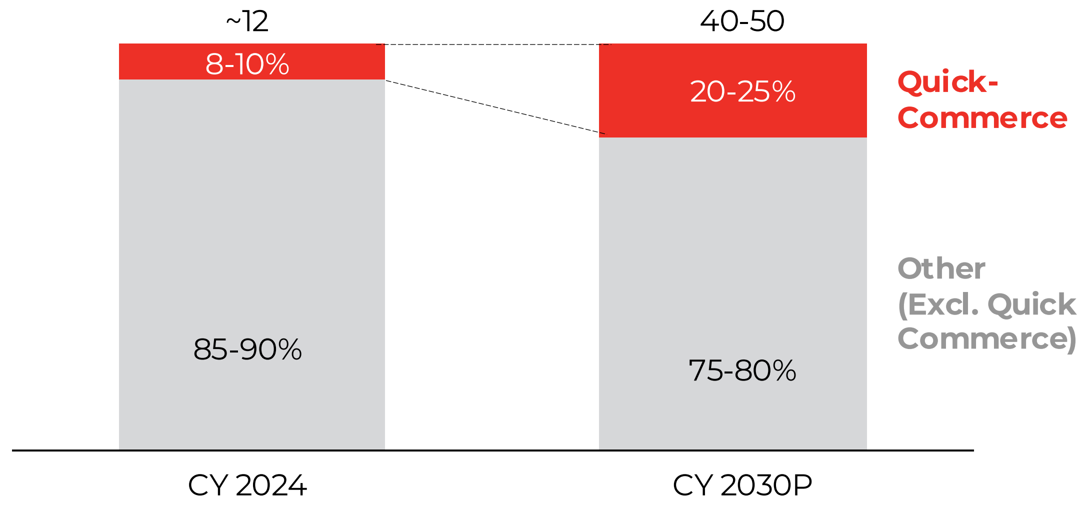
More than 1/5th of D2C brand sales and ~1/3rd of branded spends in metros are set to be QC-led in 2030

Metric Value

Low High

D2C Brands[4] Market Size Split– By Channels & Category

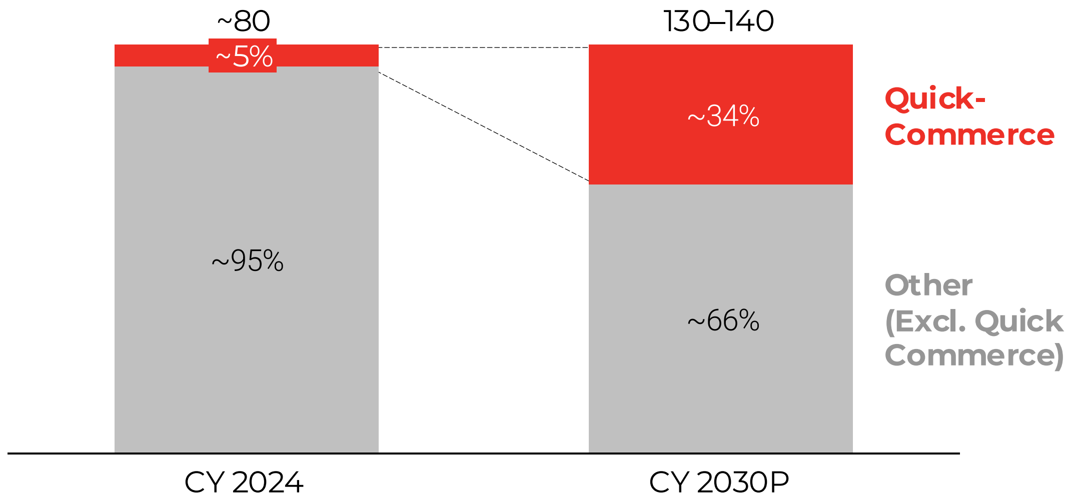
In USD Bn, CY 2024, CY 2030P



	Grocery[1]	BPC	Electronics[2]	Others[3]	Fashion
QC share % of D2C Brands by Category (CY 2030P)	50%+	30-50%	30-40%	10-20%	<10%

Branded Retail Market Size Split for Metro[5] cities– By Channel

In USD Bn, CY 2024, CY 2030P



- Strong habit formation in metros is expected to expand to a larger consumer base that accesses a greater number of categories
- High population density in these cities further strengthens QC's sustainability

Note(s): *1) : Grocery includes FMCG, Fresh and Staples. 2): Electronics include Mobiles, Electronic Accessories, Large and Small Appliances; 3): Others include General Merchandise, Home & Furniture, Pharma, Jewellery, etc. 4): D2C brands are brands with a large portion of their sales from online channels (more than 50%) and have own website/app; 5): Metro includes top 8 cities with a population over 5 million as of CY24, comprising Mumbai (Maharashtra), Delhi (NCT), Bangalore (Karnataka), Chennai (Tamil Nadu), Hyderabad (Telangana), Kolkata (West Bengal), Pune (Maharashtra), and Ahmedabad (Gujarat)*

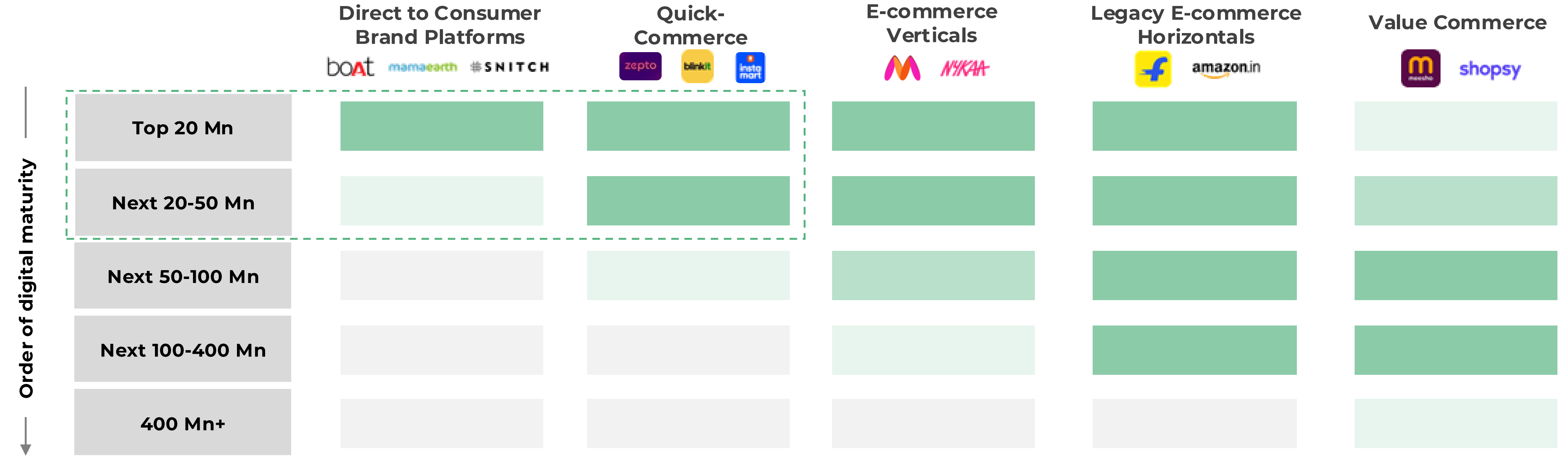
Affluent big-city GenZs & millennials will continue to form the core QC MTU base

India Digital Commerce Userbase Distribution by Platform Type

Propensity to use

Low — High

2030P



Top quick-commerce MTU profiles:

- Affluent & ultra-affluent (INR 12 LPA+ HH income)
- GenZs & millennials
- Metros & larger tier 1 cities

DINKs

Working Parents

Indulgence Seekers

Note(s): *1) : Platform logos are representative and not exhaustive.*

GT-like engagement, paired with e-commerce like control, make QC a distinctive channel

Distribution Channel Benchmarking

Metric Value

Low — High

		Quick-Commerce	E-commerce (Excl. Quick Commerce)	Modern Trade	General Trade
Consumer Engagement	Avg. Monthly Purchase Frequency (times)	5-6	3-4	1-2	10-20
	Avg. Ticket Size (INR)	400–500	800-900	2,000–2,500	100–150
Brand Control	Sales & Campaign Performance Measurement	Real-time, granular	Real-time, less granular	Available at a lag	No formal reporting
	Product Visibility & Control	High – Optimize visibility through digital ads and search/browse placements	High – Optimize visibility through digital ads and search/browse placements	Moderate – Limited to securing shelf space and promoter led visibility	Low – distributor dependent
	Speed of Replenishment	Very High – multiple replenishments per day	Moderate – warehouse-level planning, typically weekly replenishments	Moderate – store/DC replenishment typically weekly to fortnightly	Low – distributor replenishment typically once in 2 weeks
	Geo Targeting Precision	Very High – neighbourhood or city zone-level with exact precision	High - Typically State, and city level with exact precision	Moderate - City or store cluster level with low precision	Low – Territory-level via distributors with low precision

High-intent and mission-driven journeys (unlike the rest of e-commerce) require sharper consumer targeting on QC

Typical purchase journey – Q-commerce vs E-commerce

Criticality of Step: Low → High

Consumer Purchase Journey

	Need Recognition	Search & Discovery	Research	Consideration	Purchase	Post Purchase support
Quick Commerce	**Mission-led trigger** Most users open app to solve a known need	**Shortcut behaviour** Repeats past orders or utilize search; minimal browsing	**Speed > Specs** Focus on delivery time, stock status; little comparison	**Pre-decided choices** Familiar brands/SKUs preferred; low deliberation	**1-tap checkout** Fast, urgency-led buying (Delivery in 10–30 min)	**Transactional mindset** Limited re-engagement unless there's an issue
E-Commerce	**Low-moderate intent** For most users, interest is triggered passively, through ads or casual browsing	**Scroll & explore** Users browse categories casually, without fixed intent	**Specs + Reviews** Users compare products, read reviews, assess value	**Open choice set** Low brand loyalty; decisions shaped by reviews, price	**Deliberate checkout** Multi-step process with scheduling (1–5 days delivery)	**Re-engagement loop** Nudges, subscriptions, reviews drive repurchase

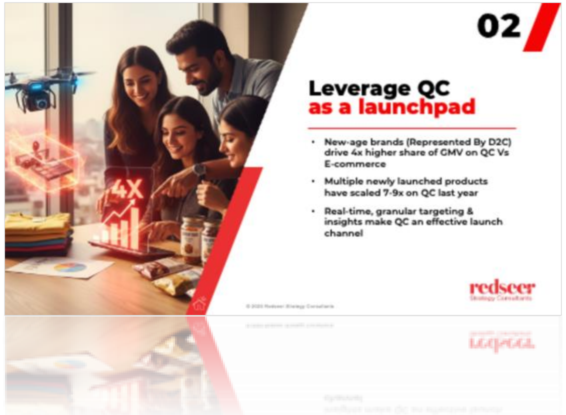
- Quick-Commerce is built for high-intent, need-now moments – users typically know what they want, act fast, and rarely browse beyond their immediate need, making it a limited exploration channel.
- E-Commerce, on the other hand, enables open-ended exploration – users tend to scroll, compare, and deliberate a lot more before deciding.

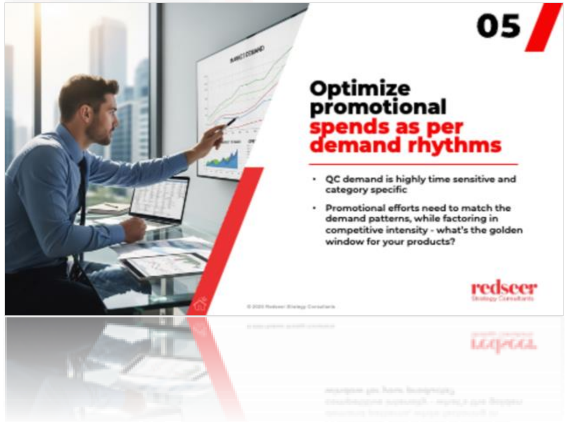
INDICATIVE

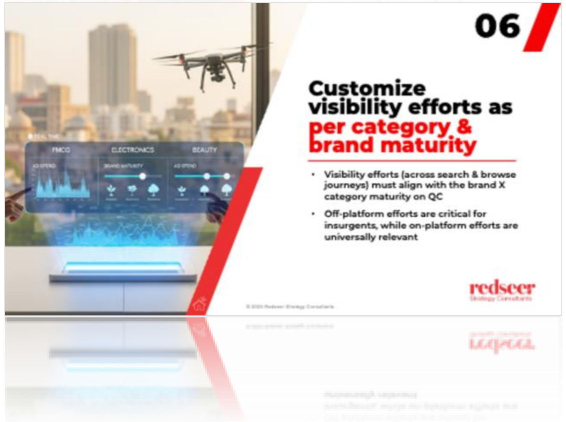
Redseer's Playbook for Brand Success on Quick-Commerce

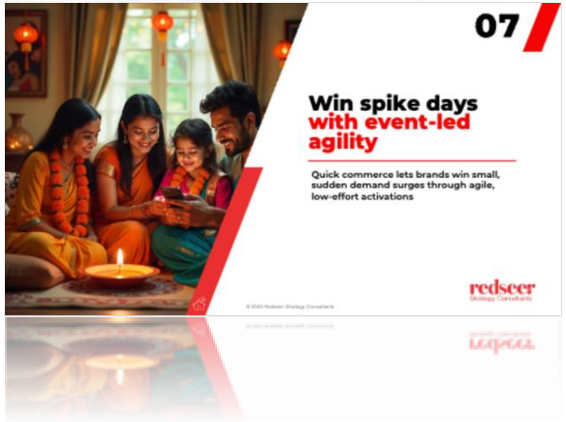
How can brands maximize India's quick-commerce potential?

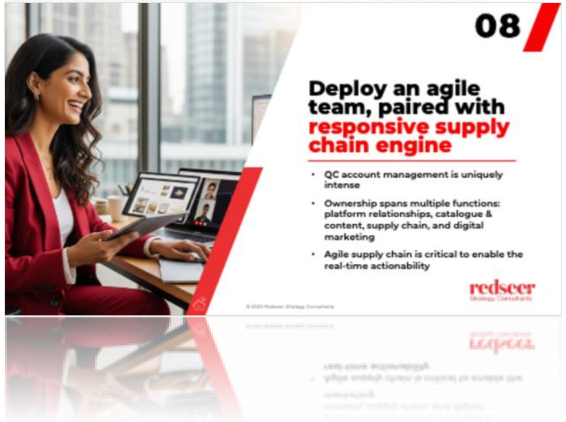
Redseer's Playbook for brand success on QC











01

Recalibrate QC identity for today's dynamic consumer trends

- **New-age consumption trends are leading the way on quick-commerce.**
  - Zero sugar beverages[1]: INR 350 Cr.+
  - Dark chocolates[1]: INR 250 Cr.+
- **Crucial for brands to align their assortment and product messaging / ad efforts accordingly**

1. Annualized GMV across QC platforms for Zero sugar beverage as of Mar-25 and Dark chocolates for May-25

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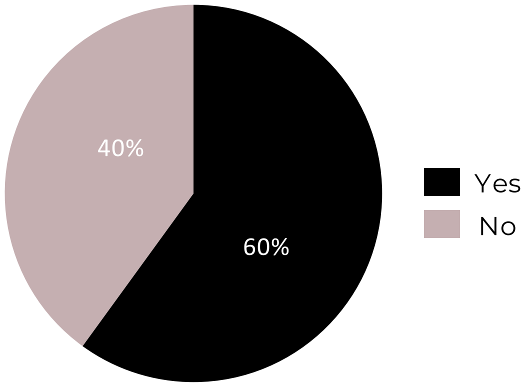
Select Examples

The core QC users are gravitating towards the new-age consumption trends

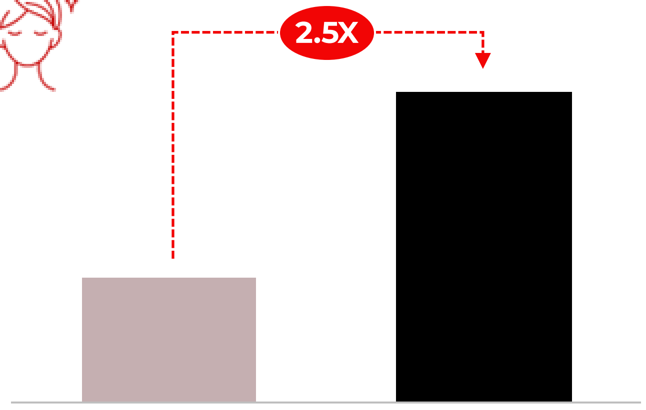
Genz and millennial-led consumption trends in India

1. Opting for Clean/ Healthy Snacking
(Protein bars, low-calorie, sugar-free products)



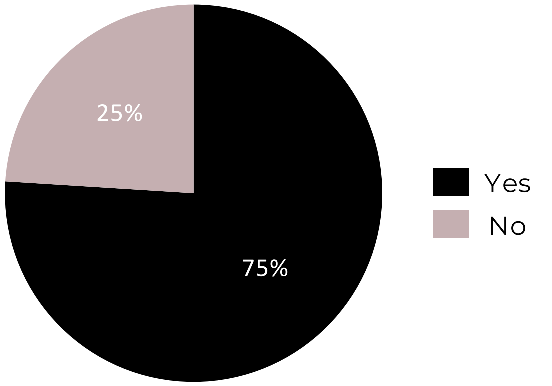
GenZs & millennials (survey respondents) willing to Pay ~15% premium for Healthy RTE / RTC products

2. Adoption of Korean Skincare
(Sunscreen, glass skin)



YoY GMV growth on leading beauty e-commerce platform (2024 vs 2023) focused on GenZs & millenials

3. Use of International Sauces and Spreads
(Mayo spreads, peri-peri, Schezwan, soy, mustard, BBQ, pasta sauces)



GenZs & millennials (survey respondents) that use sauces and spreads to complement their meals

Gen Zs and millennials are shaping India's consumption patters –
Gen Z with trend-driven, digital-first purchases, and millennials with a preference for convenience and healthier lifestyle swaps

Source(s): *Fireside Report- "THE WORLD ON OUR DINING TABLE", Redseer x Nykaa Beauty Trends Report-2024*

Select Examples

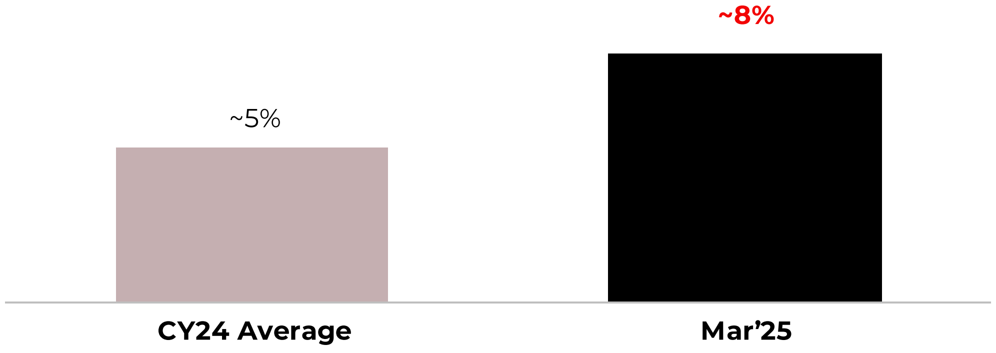
These trends are picking up tremendously on QC

New-age consumption trends on quick-commerce

INR xx Cr. *Annualized Revenue Estimate on QC (Mar / May-25)*

Zero Sugar Beverages [1]

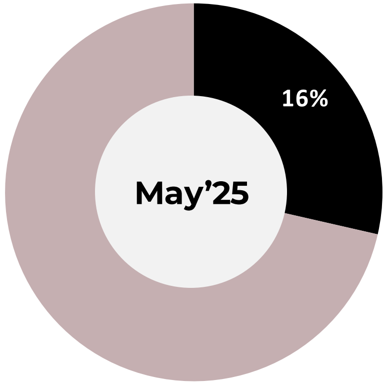
~INR 350+ Cr.



Growth in share of Zero-Sugar Beverages in overall Beverage GMV on a leading QC platform

Dark Chocolates [2]

INR 250 Cr. +



Share of Dark Chocolates in Total Chocolate GMV on a leading QC platform

New-age wellness and indulgence formats are breaking out, and quick-commerce's instant reach is the catalyst turning early curiosity into habit.

Note(s): *1. < 0.5 g total sugars per 100 ml or per labelled serving. Does not include unsweetened drinks, 2. Containing >50% total cocoa solids and contains negligible milk solids*

Select Examples

Crucial for brands to align their product assortment accordingly on QC

Brands' product assortment efforts to align with the new-age consumption trends

01

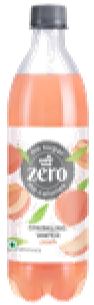
Maggi tapping Gen Z's obsession with bold global flavours and K-culture through Korean-inspired spicy noodles

02

Mother Dairy has launched 'Promilk', a high-protein milk offering convenient nutrition for health-focused consumers
(20 gm protein, daily strength)

03

Paper Boat moves beyond its nostalgia-based beverages with the launch of zero-sugar sparkling water



Select Examples

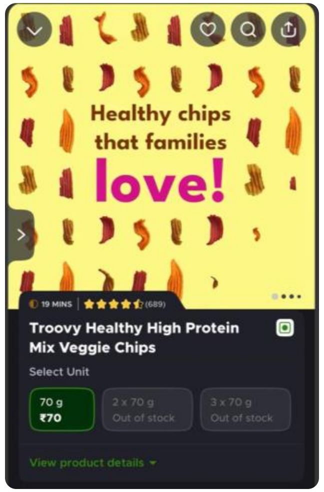
Also tailor their product messaging & AD efforts to facilitate trend-based discovery on QC

Product messaging & AD efforts to align with the new-age consumption trends

01 Product Title / Description Updates

- **Product titles now include high-volume keywords** (e.g., "Healthy Protein Chips", "Korean Sunscreen")
- Designed to **rank higher on platform search** results

troovy



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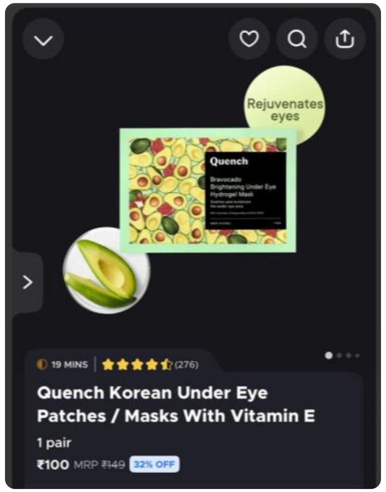
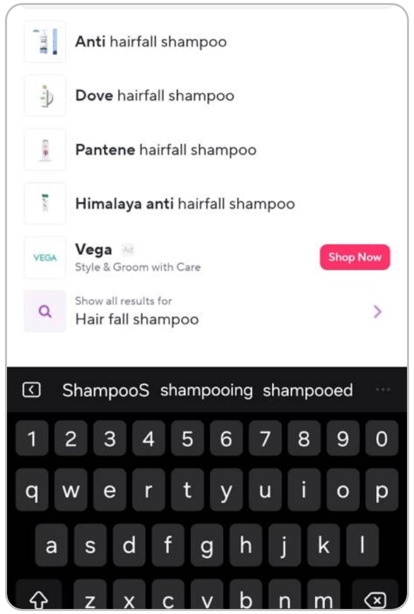
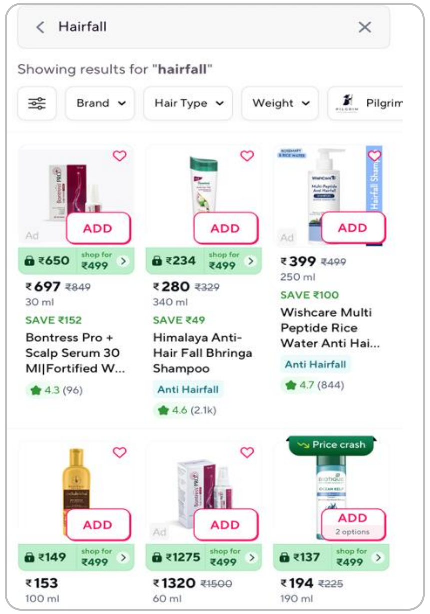


02 Search Keyword Sponsorship

- Beauty & Personal Care brands tend to run ads on **spike keywords such as "Hairfall", "Korean skincare", "Glass skin"**





02

Leverage QC **as a launchpad**

- New-age brands (Represented By D2C) drive 4x higher share of GMV on QC Vs E-commerce
- Multiple newly launched products have scaled 7-9x on QC last year
- Real-time, granular targeting & insights make QC an effective launch channel

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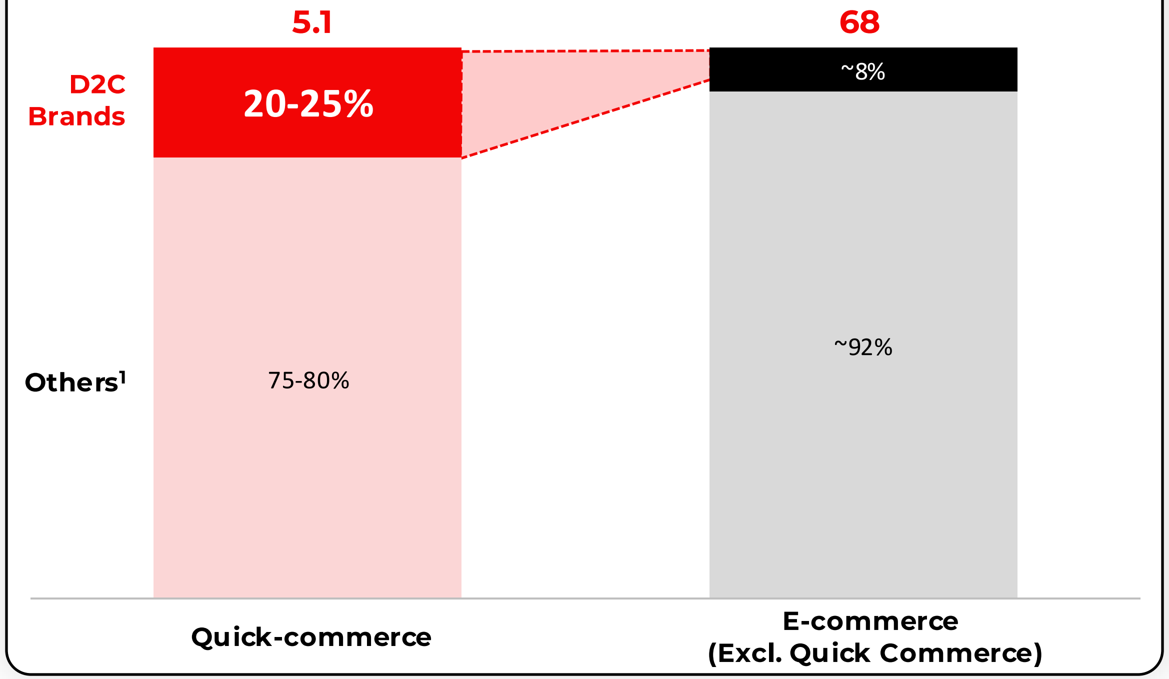
QC users are open to trying new brands and products, making them an attractive TG for new launches

New-age brands (represented by D2C) have a disproportionately high share on QC, indicating a **stronger experimentation appetite…**

…targeted extensively by both new-age and legacy brands through their extensive new launches on QC

Brand Type GMV Contribution – Quick-commerce vs E-commerce

In %, CY2024



New Launches on QC in CY2024

Select Examples

New-age Brands: | **Legacy Brands:**

- QC users are defined by a **pronounced willingness to experiment**, with a strong preference for discovering and trying out new brands and products
- This openness is especially pronounced among **Gen Z and Millennials**, who comprise the platform's core user base

Note(s): *Others include legacy, regional and unbranded market size*

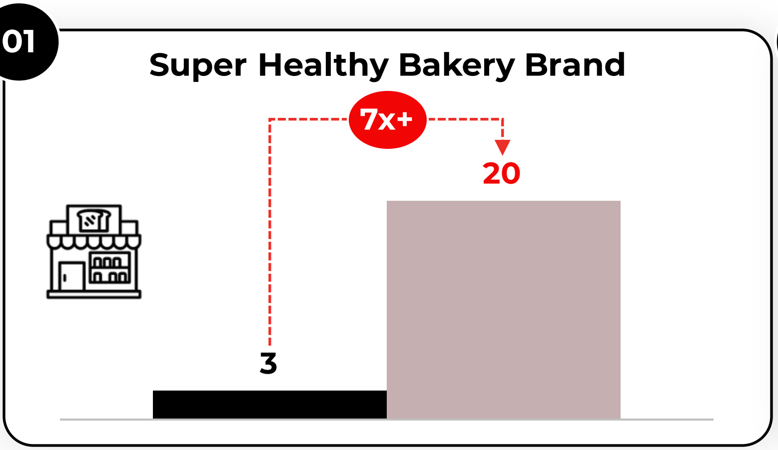
Select Examples

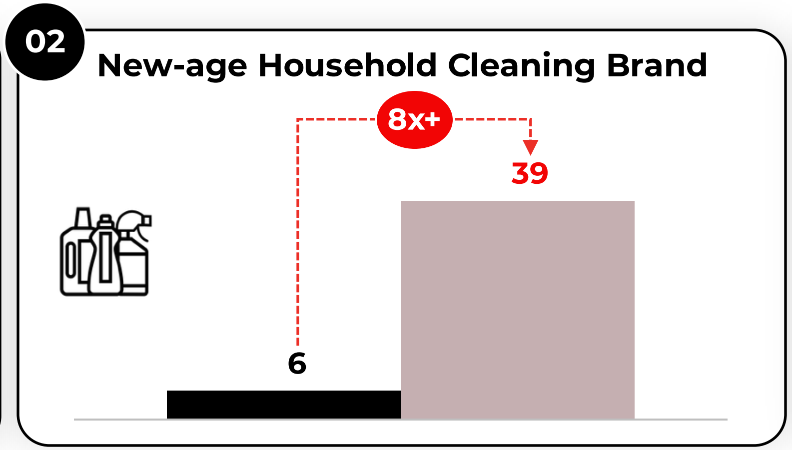
Last year's launches have witnessed an accelerated scale-up on QC

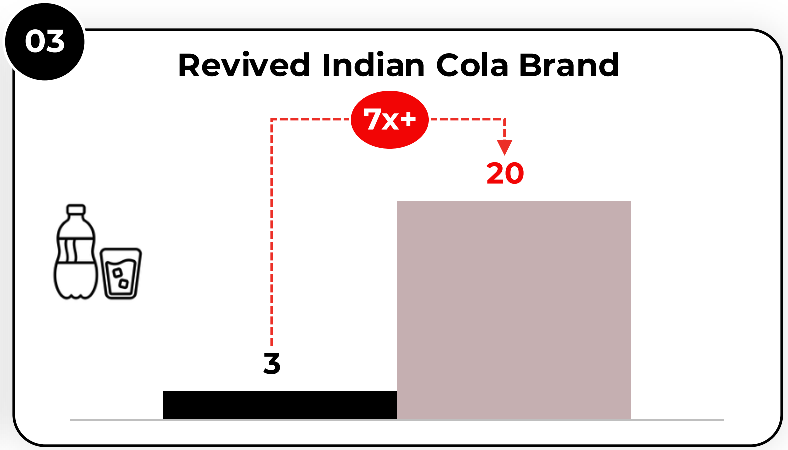
Growth in new launches on a leading quick commerce platform[1]

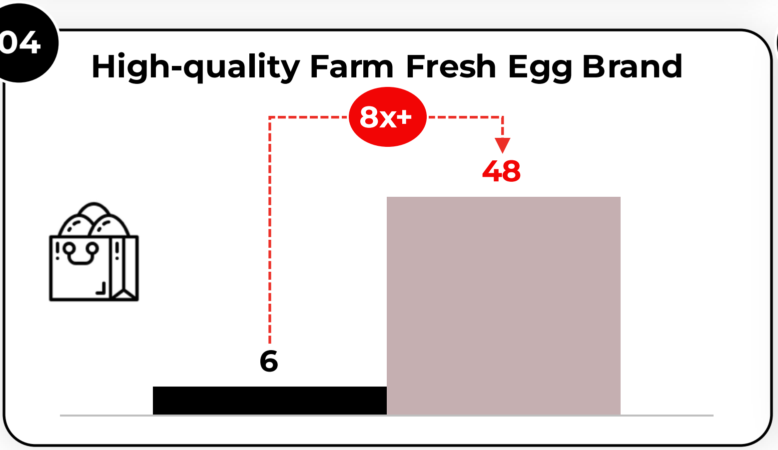
■ 2024 ■ JFM-25 Annualized

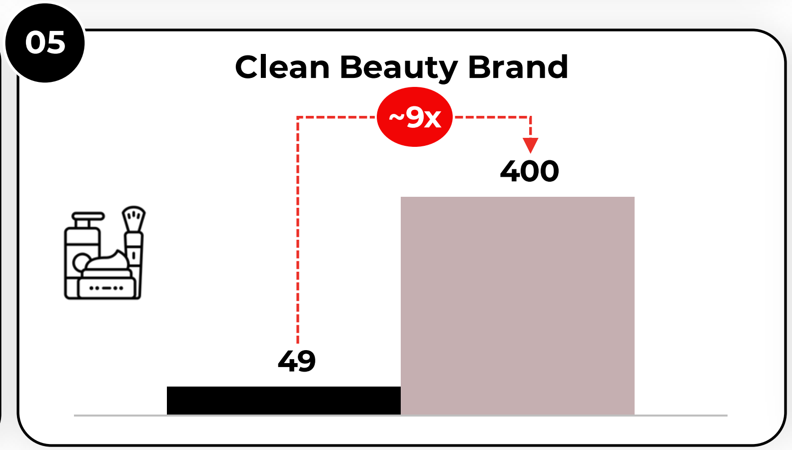
GMV in INR lacs, Y-o-Y growth in (%)

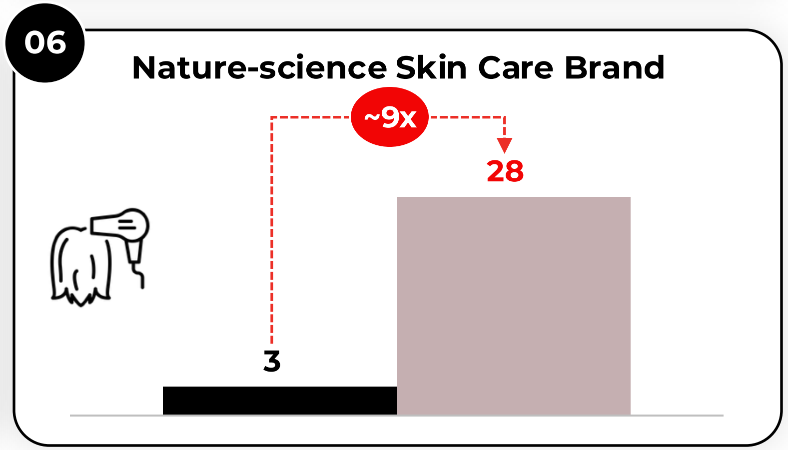












Note(s): *1. Examples include brands launched in 2024*

Real-time & granular targeting abilities and insights, make the launch exceptionally effective on QC

Product launch capabilities – by channel

Performance

Low — High

As of June 2025

	Quick-Commerce	E-commerce (Excl. Quick Commerce)	Offline Retail
01 Real-Time Feedback Velocity	"SKU dashboards land within hours." – *Head of Growth*	"Daily pulls show trends by day two." – *Category Manager*	"Sell-out data arrives after the fortnight close." – *Area Sales Manager*
02 Geo-Adaptive Rollout	"I can toggle pin codes on or off instantly." – *Regional Ops Manager*	"E-com nudges regions; only QC gives true pin-code on/off." – *Ex-Marketplace Ops Lead*	"Reach stops where the distributor network ends." – *Trade Marketing Exec*
03 Elasticity/ Price Sensitivity Testing	"Same-day A/Bs on time-of-day pricing are easy." – *Revenue Analyst*	"Coupon splits need a full week for clean reads." – *Performance Marketing Lead*	"Price packs shift seasonally, never mid-cycle." – *Channel Strategy Head*

Quick commerce creates a **test-and-scale flywheel**—brands can seed an SKU in targeted pin-codes, validate demand in real time, and then roll out nationally with data-driven accuracy

03

Sharpen the assortment based on micro-market demand

- Distinct micro-market demographics call for tailored assortments
- Limited dark store capacity demands a sharper focus on high-velocity SKUs
- Platforms are advancing their capabilities to enable micro-optimizations

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Select Examples

Consumer demographics differ starkly by micro-market within a city

Illustrated below for few micro-markets in Bangalore

Indicative consumer demographics mix – by micro market

Prominence of Demographics

Low — High

Demographics		Bellandur	RT Nagar	HSR Layout
Degree Of Relationship With The City	**Native**			
	Migrants			
Occupation	**Working Professionals**	• Early to senior executives • Working at nearby tech parks – ETV, Pritech Park, Prestige Business Park		• Early to mid-level executives • Mostly working at startups and nearby tech parks and co-working space
	Business		• Local business owners	• Large business families
	Students		• Adarsha PU College, RS College, Atria Institute, Dairy Science	• NIFT, Oxford College, Shakuntala Devi
Housing Setup	**Independent Houses**	• APR Villas	• HMT layout and Anandnagar	• Sector - 6
	Independent Apartments	• Green Glen Layout	• Rahmath Nagar & Ganga Nagar	• Across the micro market
	Small Gated Society	• Green Glen Layout		• Sector 4 and 3
	Large Gated Society	• Across the Micro Market (Mantri Espana, Shobha Iris, Shobha Jasmin, Shobha Daffodil, etc)		
Dominant Ethnic Groups		• Bengal, Gujarat & Maharashtra	• Native South Indians • Muslims	• Marwadi and Telugu
Average Monthly Rent / SQFT		• INR 20-25	• INR 15-20	• INR 20-25

Select Examples

The differing demographics result in distinct brand preferences

Illustrated below for few micro-markets in Bangalore

Product Preference as per GT / Kirana Stores – by Micro Market

Spend within a Micro-market

Low — High

Type of Brands	Bellandur	RT Nagar	HSR
Legacy Brands			
Insurgent Brands	**Widely consumed** across categories such as: RAW: Beverages; Mr Makhana: Snacks; Pro Nature: Grains & Atta; Desi Nutri: Oil; Buldak: Instant; Ministry of Nuts: Dry fruits	**Limited to few categories** such as: Mr Makhana: Snacks; Pro Nature: Grains & Atta; Ministry of Nuts: Dry fruits	**Limited to few categories** : Pro Nature: Grains & Atta; RAW: Beverages; Milky Mist: Dairy
Regional Brands	**Limited to few categories** such as: Nandini: Dairy; Loose Grains & Atta; Local Bakery	**Widely consumed** across categories such as: Indira's: Snacks; Sakthi Masala: Spices; Gits: Instant; Milky Mist: Dairy; Nandini: Dairy; Loose Grains & Atta; Local Bakery	**Limited to few categories** such as: Nandini: Dairy; Loose Dry fruits; Local Bakery

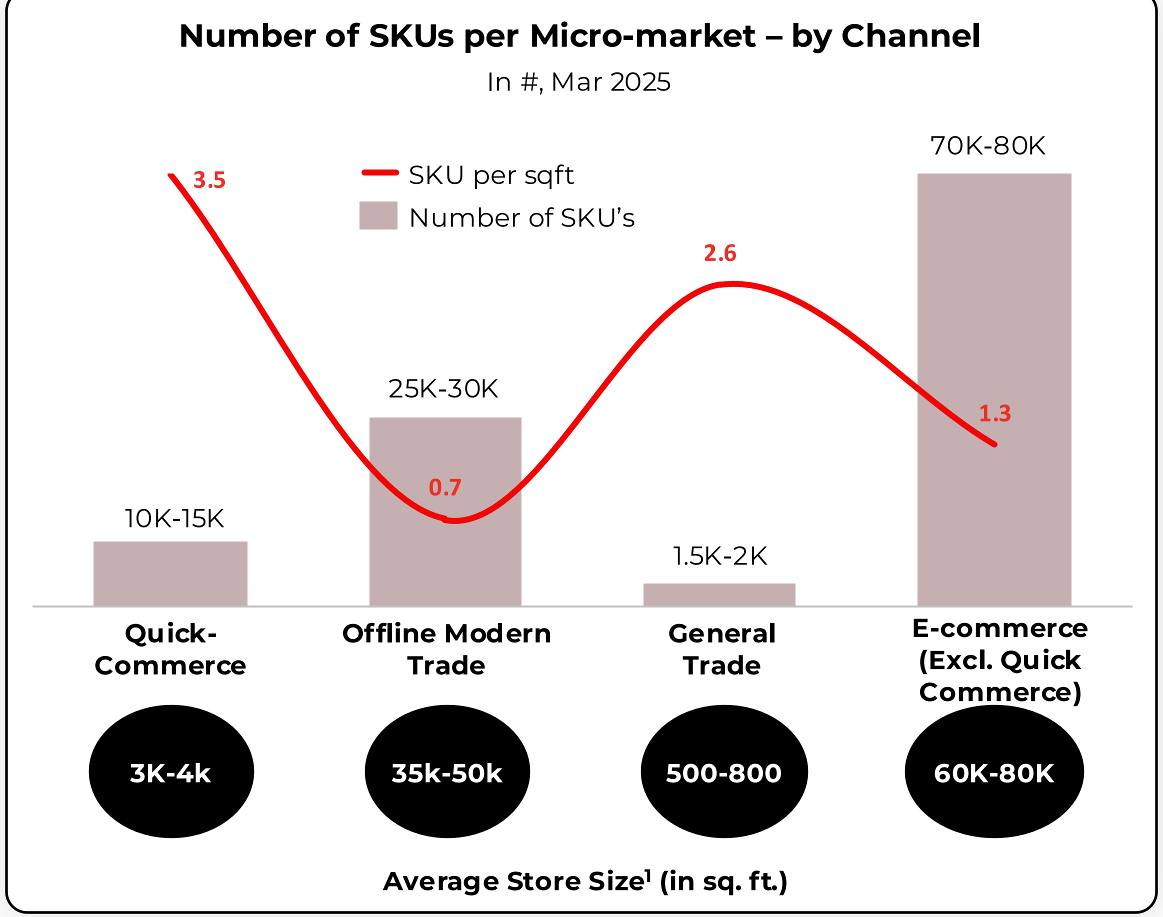
Note(s): *1. Legacy brands: A brand that has been operating for more than 20+ years and in more than three states, establishing a broad market presence across multiple regions, 2. Insurgent Brands: Challenger brands that typically target niche consumer needs and have a sharp differentiation; 3. Regional brands: A brand primarily dominant in one or two states, catering to local preferences and maintaining a strong regional footprint*

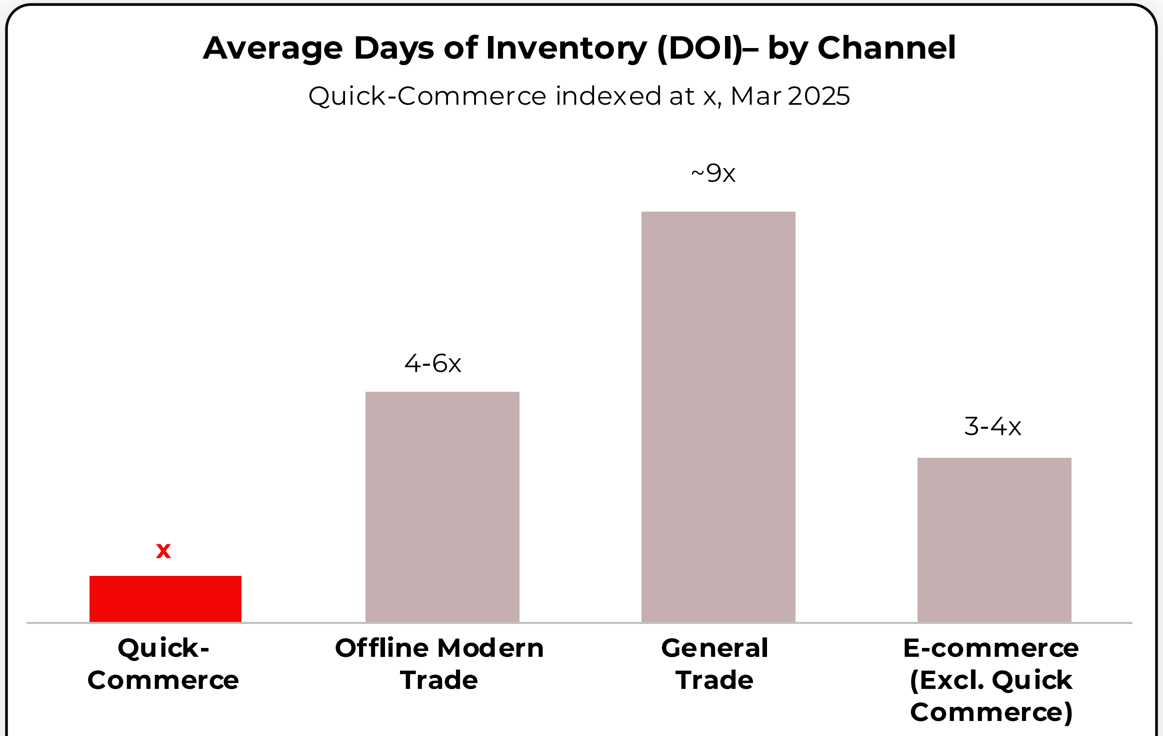
Indicative

Secondly, dark store space is highly optimized and best-suited for high-velocity products

QC shelf-space per micro-market is limited, and highly optimized for speed and efficiency…

…this space is best utilized by faster-turn products





Slow-moving products on QC not only lose sales but also drive returns, limit visibility, and weaken brand–platform partnerships.

Note(s): *1. Average Store Size represents dark store for quick commerce, warehouse for e-commerce and stores for offline modern trade and general trade*

Illustrative

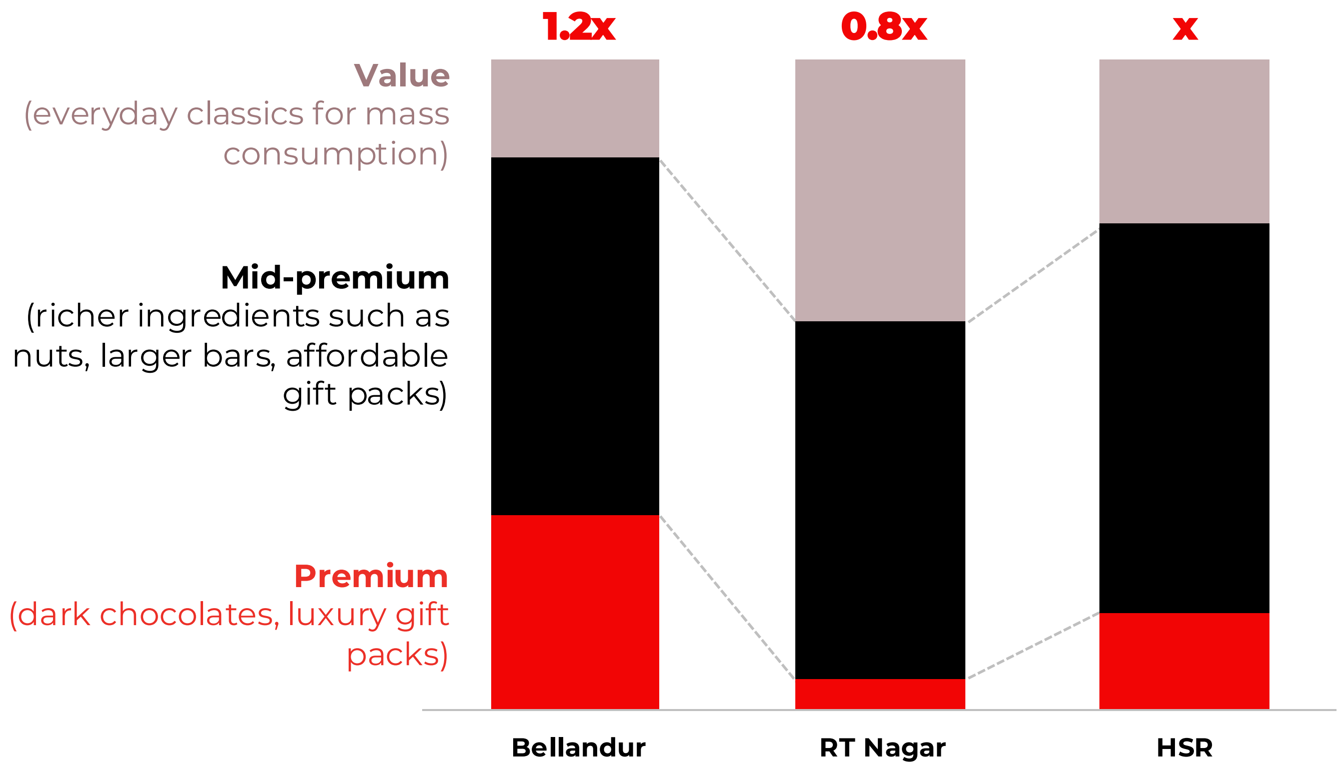
Imperative for brands to align their assortment with micro-market demand *(Illustrated Below For The 3 MMs In Bangalore)*

Product Assortment Optimization by micro-market – Illustration

Quantity Indexed at x for HSR

Recommended SKU Scale & Mix for a chocolate brand in Example micro-markets in Bangalore

(Illustrated Below)



Ensure optimum quantity and appropriate mix of product range within each micro-market

Also optimize the targeting efforts (through promos and ad / media spends) by micro-market – currently less explored by brands / platforms

Platforms are also advancing their capabilities to enable efficient dark store level decision making by brands

Dark store level decisioning framework

Platforms are shifting towards more product-led approach to enable dark store level decisions

	1. KAM-led Approach	2. Product-led Approach
A **Basis for Decision Making** (assortment optimization, promo approach etc.)	**Discussions with KAMs on hyperlocal demand trends and stock availability**	**Real-time dark store level insights and trends**
B **Decisions** (Stock transfer/ promo start/ pause etc.)	**Communicated manually through KAMs**	**Communicated through the brand-facing tool**

Product-led approach with the optimal blend of KAM inputs will be a sustainable & effective way to enable dark store level decision making.

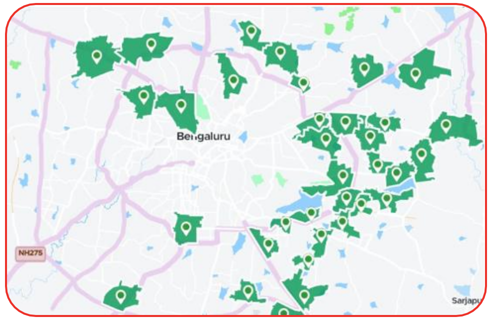
Zepto Atom's micro-tracking and targeting features

Zepto Atom Features

zepto ATOM

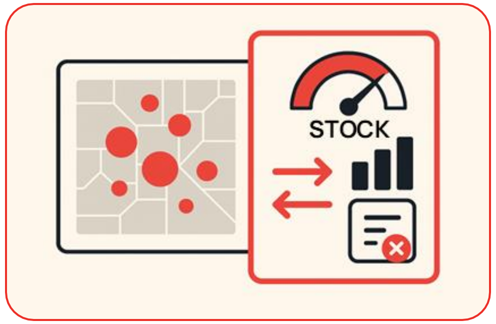
Real-time micro market sales tracking

- **Refresh cadence:** Live, 60-second data drops
- **Spatial resolution:** PIN-code granularity
- **Action lever:** Surface demand gaps and redeploy stock before targets slip



Dark store level stock availability

- **Metric tracked:** Live days-of-cover per SKU-store
- **Diagnostic view:** Lost-sale heatmap at PIN-code level
- **Action lever:** Auto-transfer stock or pause promos pre-OOS



To meet rising brand demand for deeper, localized insights, platforms like Zepto have built micro-targeting tools that deliver real-time data on sales, inventory, and consumer behaviour – down to the dark store level

04

Drive profitability through smart upselling

- Appropriate premiumization and bundling can help unlock higher profitability on QC
- High QC user orientation towards premium products further aids action
- Platforms to continue promoting premium / bundled products to improve economics

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Illustrative

Brands must actively upsell on QC to offset the high channel costs

Consumer Brand Profitability (Illustrated for Legacy FMCG brand)

Per sold unit, Cost heads as % of Revenue

	Gross Revenue *(assumed at INR 100)*	Channel Spends[2]	COGS	Operating Expenses (including fixed costs)[3]	EBITDA
Traditional commerce channels[1]	INR 100	15-20%	~40%	~25%	15-20%
Quick-Commerce for same product packs as traditional commerce	INR 100	20-25%			10-15%
1. Quick-Commerce with Premiumization	↑		↓	↓	↑
2. Quick-Commerce with Bundling	↑			↓	↑

Upselling

Note(s): *1. Traditional Commerce Channels includes General Trade, Offline Modern Trade, and E-Commerce; 2. Channel Spends include on-platform commission, marketing and promotions and other channel specific fees; 3. Operating Expenses include all ongoing costs required to run the business aside from direct production like salaries for administrative, sales, and support staff, Rent, utilities, and maintenance of corporate offices and warehouses (excluding plant-specific overhead in COGS), Marketing and brand development (not included in channel spends), IT, finance, legal, and other back-office functions*

Select Examples

The two key levers are product bundling and premiumization

Illustrated below for certain brands

Quick-Commerce upselling examples

✓ Profitability Benefits

Product Bundling

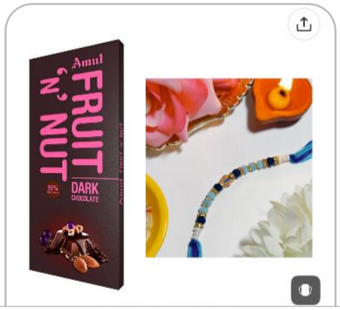
1A Same product multi-packs at affordable price-point

MRP of 1Pc: **Rs 50** ✗

MRP of 4Pc: **Rs 200** ✓

- ✓ Higher revenue against similar marketing / fixed expenses
- ✓ Faster inventory turn driven by better perceived value

1B Complementary product bundling



MRP of individual item: Rs **100-150** ✗

MRP of combined offering: **Rs 299** ✓

- ✓ Stock clearance
- ✓ Improving margin mix
- ✓ Higher revenue against similar marketing / fixed expenses

2 Premiumization based on ingredients, materials, brand positioning, packaging etc.

MRP of regular Tata Salt: **Rs 26/kg** ✗

MRP of Superlite Salt: **Rs 75/kg** ✓

- ✓ Better margins
- ✓ Higher revenue against similar marketing / fixed expenses

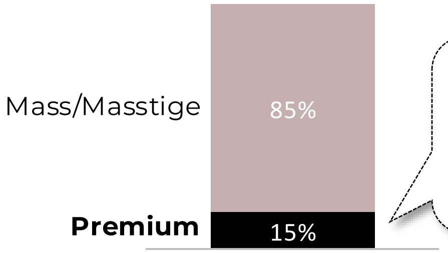
Select Examples

Premium propositions resonate strongly with QC shoppers, and could also be a path for brands to gain market share

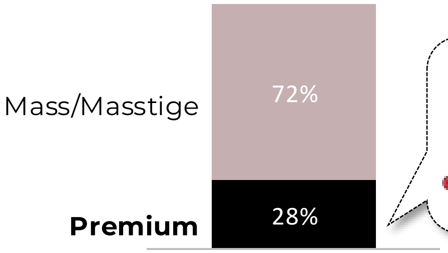
Premium brand share of product categories – Leading QC Platform

Premium share is indicative as per brand's positioning in the category

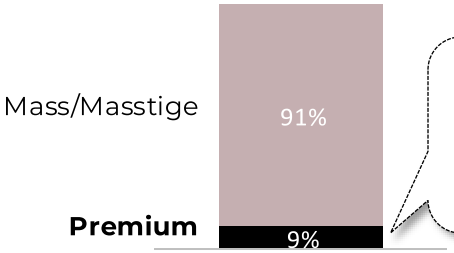
01 Coffee



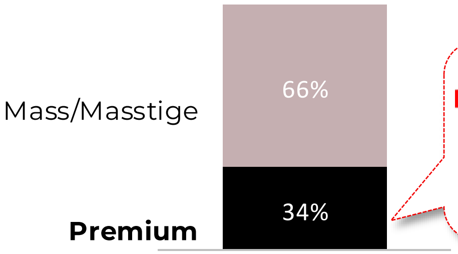
02 Sauces



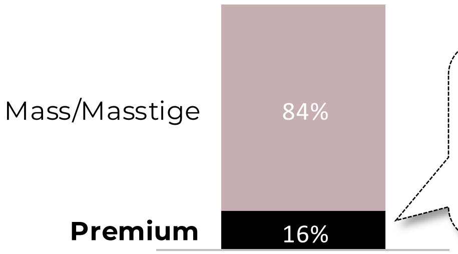
03 Male Grooming



04 Bakery Products



05 Skincare



Note(s): *1. Coffees include instant, filter coffee, flavoured instant, roasted beans, ground coffee, cold brew, and ready-to-drink beverages. 2. Sauces include tomato ketchup, mayo spreads, peri-peri, Schezwan, soy, mustard, BBQ, pasta sauces, Asian stir-fry, and curry bases. 3. Male Grooming product types include razors, shaving creams, beard oils, face wash, body lotions, fragrances, and hair removal products. 4. Bakery products include cake mixes, brownie mixes, pancake batters, frosting, ready-to-bake cookie dough, baking powders, cocoa powders, premade pie crusts, and dessert toppings. 5. Skincare includes face washes, moisturizers, serums, sunscreens, face masks, toners, scrubs, under-eye creams, lip balms, cleansing oils, anti-acne treatments, and night creams.*

Select Examples

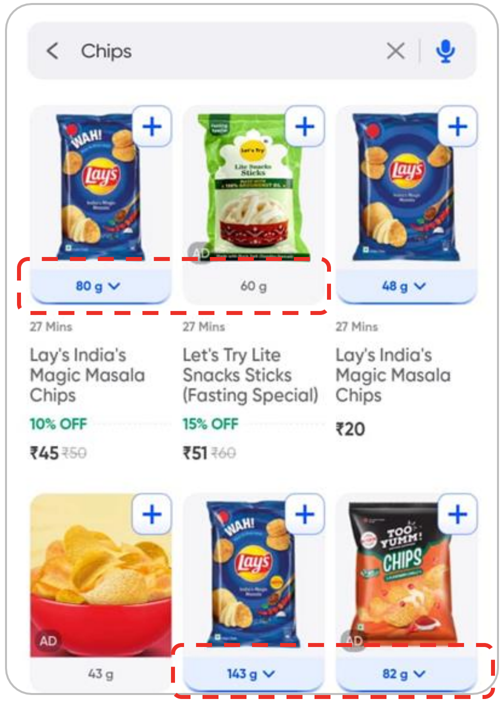
This is reinforced by QC platforms, which are increasingly promoting high-ASP products

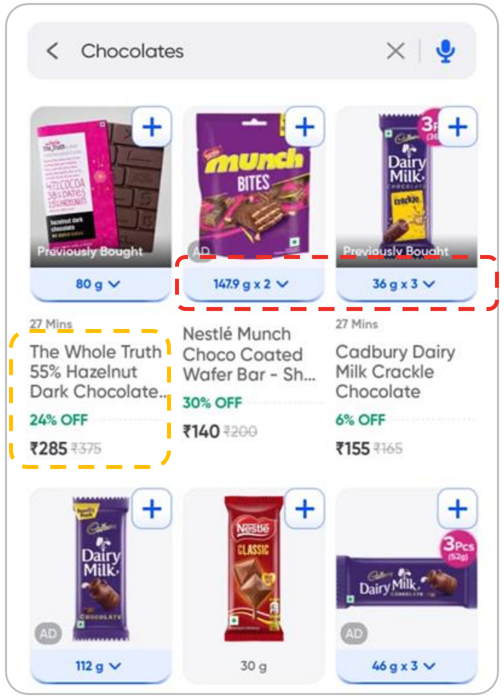
Examples of QC platforms pushing higher ticket sizes

Premium offering | Large/Multi pack offerings

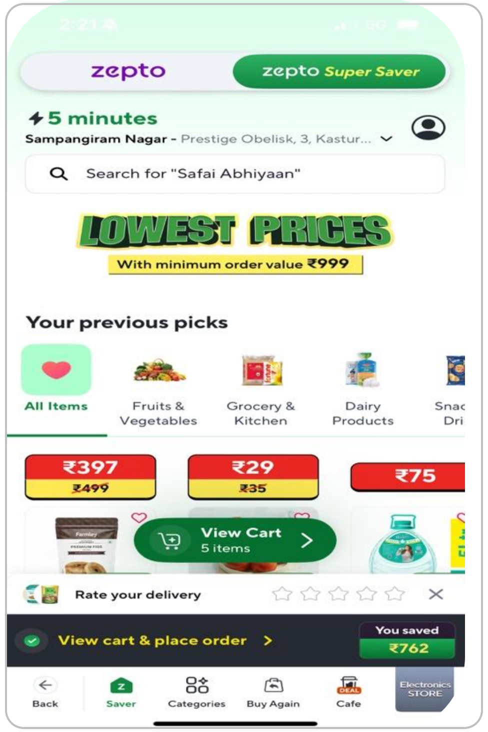
01 Easier Discovery of Multi / Large packs and Premium SKUs

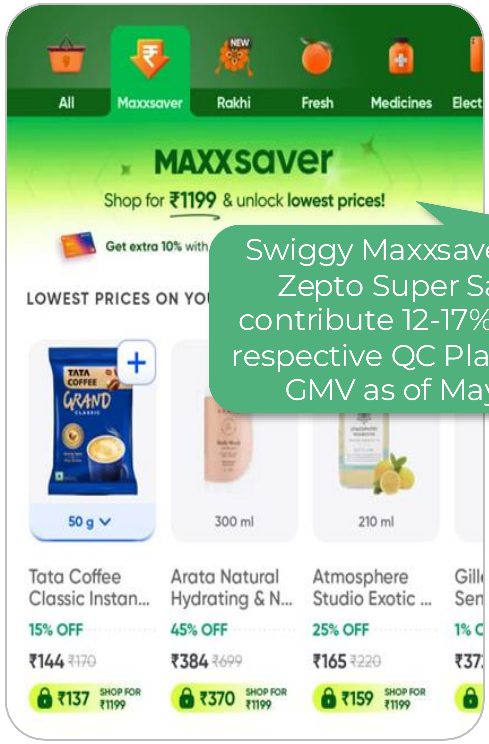
Top 6 products on a leading QC platform in Bangalore[1] location





02 Active Promotion of Large Baskets





Swiggy Maxxsaver and Zepto Super Saver contribute 12-17% of the respective QC Platform's GMV as of May'25

Note(s): *1. Based on app data in sampangiram nagar- kasturba road (Bangalore-560001)*

Illustrative

The trend likely to sustain as larger basket values improve platform order economics

QC Order economics (industry average) – impact of AOV Increase

INR, % of AOV

	March'25	Future Scenario: 10% Higher AOV	Commentary
Average Order Value (At Selling price)	**470**	**520**	Increased promotion of high-ASP products to expand the basket value
Commissions & Ad Revenues	20%	20%	
Customer Delivery Charge, Handling Charge & Other User Fee	4%	4%	• Higher basket value will command lower delivery charge, but higher handling fee, potentially offsetting each other
Dark store/replenishment/ other variable costs	**(12%)** → -1% →	**(11%)**	• Fixed costs (e.g. rents, manpower) gets distributed on a larger basket size • Improved order consolidation and picking efficiency leads to reduction in wastage / expiry costs
Delivery/Last mile costs	**(9%)** → -0.5-1% →	**(8%)**	• Last-mile delivery costs (fixed per order) gets distributed on a larger basket size
Platform funded discounts / customer incentives	(0.5%)	(0.5%)	
Contribution Margin	**2.5%** → +~2% →	**4.5%**	

05

Optimize promotional spends as per demand rhythms

- QC demand is highly time sensitive and category specific
- Promotional efforts need to match the demand patterns, while factoring in competitive intensity - what's the golden window for your products?

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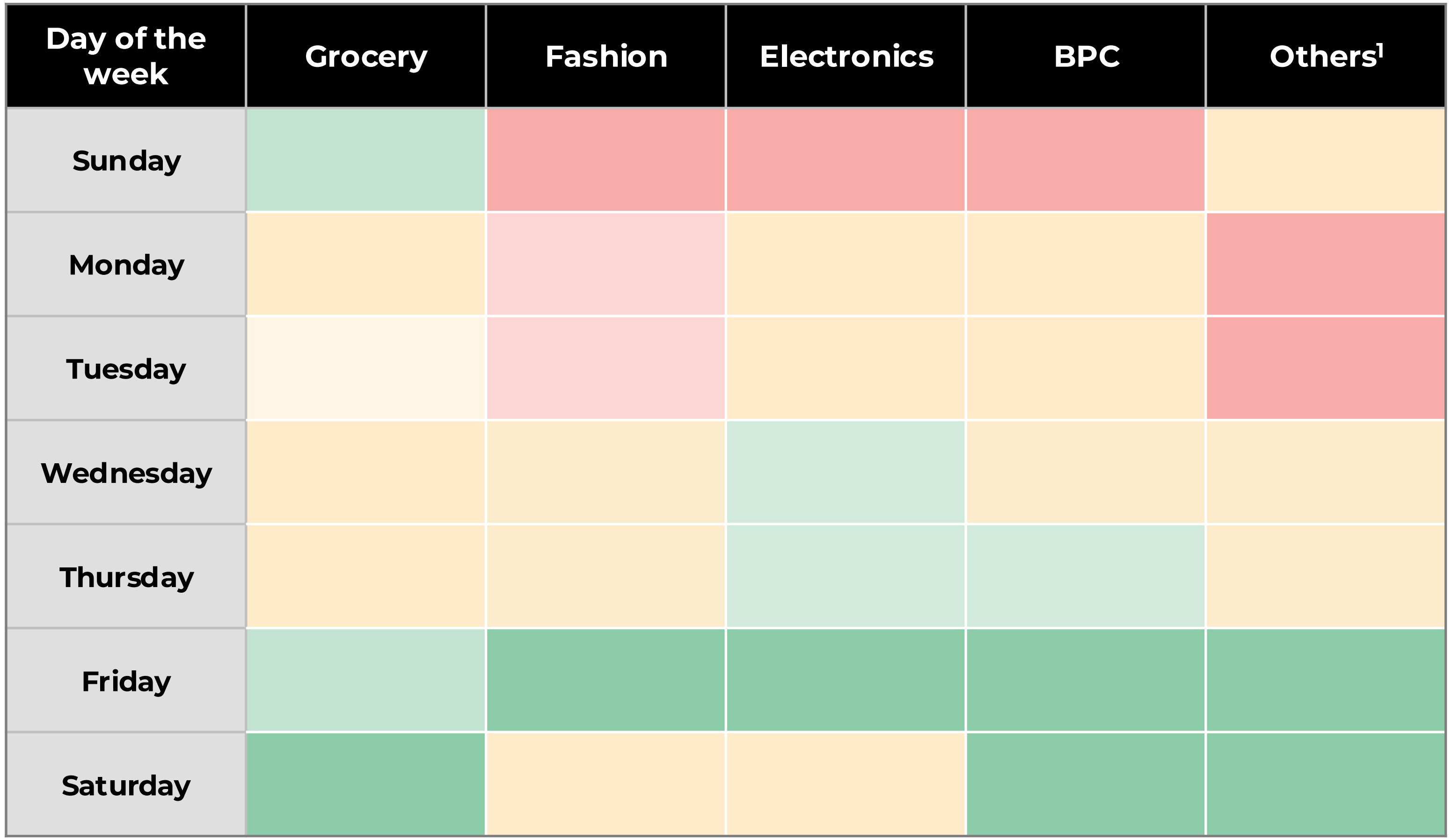
Indicative

QC demand is highly rhythmic – fluctuating across different days within a week

Weekly Consumer Demand on QC – by Category

Daily Average No. of Orders within a category

Low — High



Key Highlights

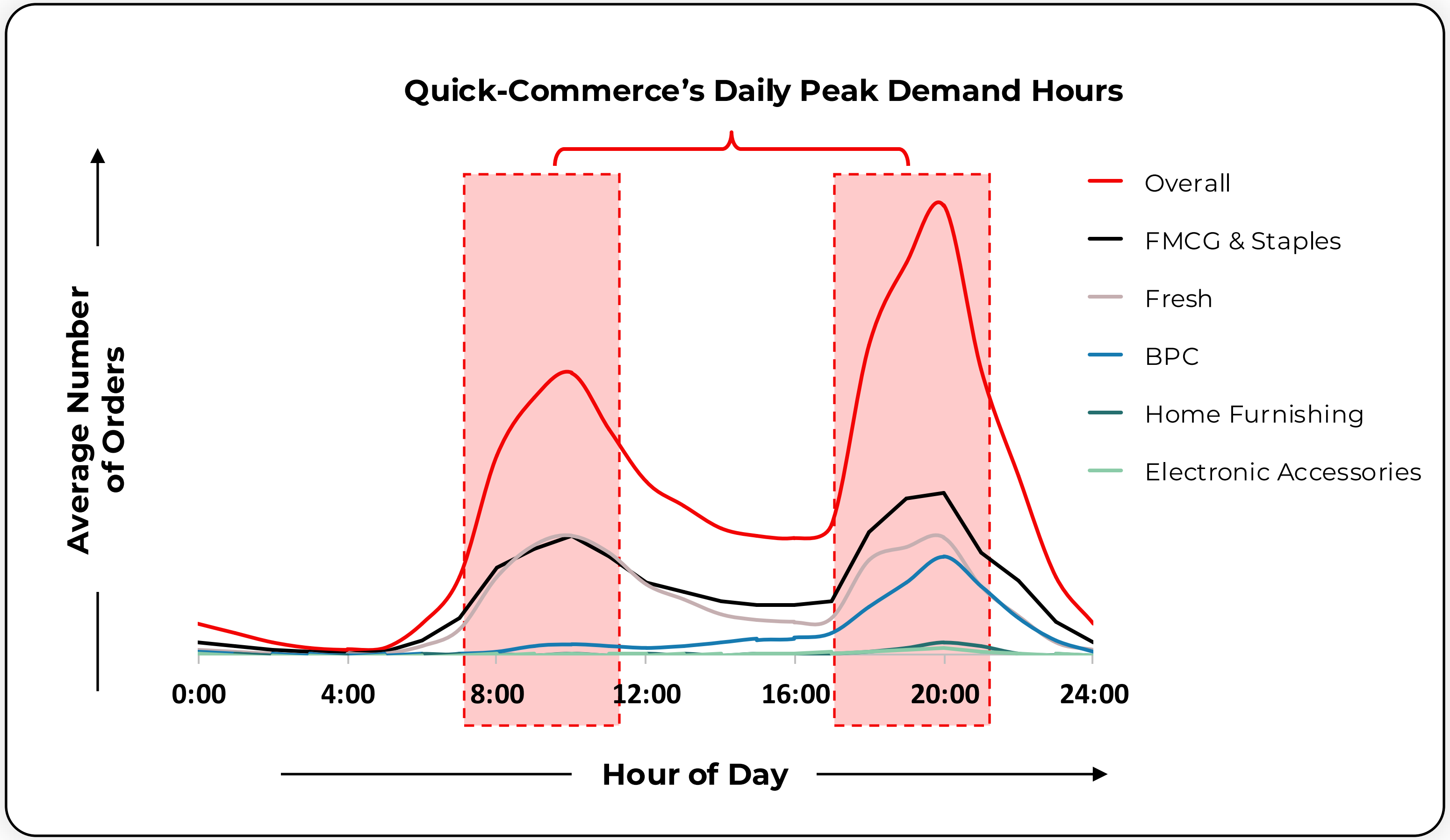
- Grocery demand remains high and stable across the week, with **only ~20% variance**
- BPC shows sharp, **lifestyle-driven** surges around weekends
- Fashion, Electronics, and Others exhibit diverse and **less predictable weekly demand curves**

Note(s): *Others include General Merchandise, Home & Furniture, Pharma, Jewellery, etc.*

Indicative

Two demand peaks typically emerge within a day – in the morning and in the evening

Typical daily demand pattern on QC – by category



Key Highlights

Grocery demand peaks twice daily, **morning (7–11 AM)** and **evening (6–10 PM),** aligned with household routines

BPC demand is heavily evening-skewed, with **maximum conversions between 7–10 PM**

Others follow **Grocery's rhythm, with moderate morning and evening peaks**, often driven by **bundling or convenience**

Indicative

Crucial for brands to align their promo & ad spends as per the demand patterns, while also factoring in competitive intensity (1/2)

Promotional windows on quick-commerce

Performance: Low → High

Purchase Intent	Platform Noise: Low (Fewer distraction, Limited promotions, low costs)	Platform Noise: High (Many brands, intense promotions, high costs)
High customer readiness to purchase	**1. Golden Window** • High intent, low distraction, promotional sweet spot	**2. Battlefield** • Most competitive times - many shoppers, many brands; invest in high-visibility, targeted promos
Shoppers are mainly browsing with very low conversion	**4. Quiet Zone** • Few buyers, little activity, best for soft launches or minimal promos	**3. Clutter Cloud** • Lots of brand clutter, while purchase intent is low • Not ideal for conversion-heavy promos

Illustrative

Crucial for brands to align their promo & ad spends as per the demand patterns, while also factoring in competitive intensity (2/2)

Promo AD spend ROI window – Illustrative

Parameters	Tea Biscuits	Fizzy Beverage	Face Sheet Mask	Bluetooth Speaker
1. Golden window	**Tue/Wed morning (7–11 AM)** • Stock-up mindset • Low platform noise • Refill with essentials	**Mon/Wed evening (6–8 PM)** • Light weekday indulgence • Post-work craving • Low clutter for impulse buys	**Tue/Thu night (8–10 PM)** • Pre-weekend skincare prep • Low distraction • Relaxation-oriented mindset	**Wed/Thu evening (3 PM–7 PM)** • User in exploration mode • Low noise • Leisure items get attention
2. Battlefield	**Sat/Sun evening (2 PM–6PM)** • Peak grocery sale window • High platform clutter • Needs high promo investment	**Sat/Sun evening (6–10 PM)** • Party/snacking triggers • Competes with multiple beverage/snack brands	**Sat/Sun night (8–10 PM)** • High competition from beauty brands • User overwhelmed by promos	**Sat/Sun afternoon (2–6 PM)** • Popular for gift shopping • High brand activity in electronics
3. Quiet zone	**Mon late night (10 PM–2 AM)** • Very low activity • Good for A/B testing or soft campaigns	**Tue/Wed morning (10 AM–1 PM)** • Minimal demand • Not a beverage-consumption window	**Mon early morning (8 AM–12 PM)** • Not skincare primetime • Low conversion intent	**Thu early morning (10 AM–2 PM)** • Zero engagement hours • Not suitable for leisure products
4. Clutter cloud	**Sat/Sun afternoon (2–5 PM)** • High site traffic • Users distracted • Not pantry-buying time	**Sat/Sun afternoon (2–6 PM)** • Promo overload • Low conversion despite visibility	**Sat/Sun afternoon (2–6 PM)** • Overcrowded with beauty offers • User fatigue reduces conversion	**Sat/Sun evening (6–8 PM)** • Heavy promo clutter • Users browse, rarely convert on discretionary items

06

Customize visibility efforts as per category & brand maturity

- Visibility efforts (across search & browse journeys) must align with the brand X category maturity on QC
- Off-platform efforts are critical for insurgents, while on-platform efforts are universally relevant

AD objectives on QC depend on the brand X category maturity

Advertising Strategy by Brand and Category Maturity

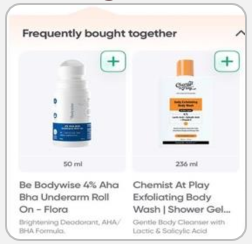
Category Maturity

Popular or high-traffic category

1. Ignite Consideration

Insert a less-known brand into established shopping journeys

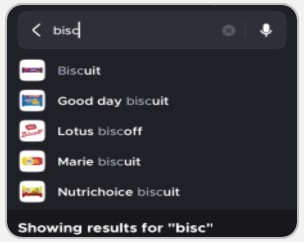
Frequently bought together



2. Drive Action

Maximize conversion and share-of-wallet in a mature, high-traffic aisle

Sponsored search

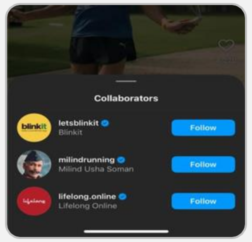


Emerging or under- developed category

4. Create the Market

Generate the very first trials in a nascent category

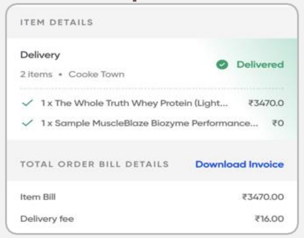
Influencer-led reels



3. Catalyze adoption

Convert brand-familiar users in an emerging category

Free Sample packs



Low
(Insurgent / emerging brand)

High
(Well-known brand, easy to identify)

Brand Maturity

Illustrative / Non-Exhaustive

Brands' visibility efforts must align accordingly

Effectiveness of Quick-Commerce Visibility Levers

On-Platform | Off-Platform

Effectiveness: Low — High

		1. Ignite Consideration	2. Drive Action	3. Catalyze Adoption	4. Create the Market
Paid Search	Competitor-keyword interception				
	Priority keyword sponsorship				
	Attribute / use-case targeting				
	Off-platform search ads				
Paid Display	Homepage hero banner				
	Category-header takeover				
	In-cart promotional tile				
	Sampling				
	Social media ads				
	Offline ATL				
Organic Search and Browse	Search-optimized product pages				
	Brand storefront / microsite				
	Platform-recommended products				
	Social Media Content with QC Call-to-Action				

Illustrative

Off-platform is essential for insurgents (brands / categories) to seed awareness

Driving Visibility via Off-Platform Levers

Create the Market

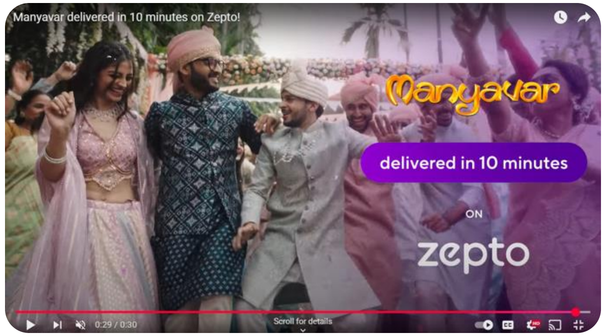
Offline ATL + QC Call-to-Action
(Paid Display, off-platform)

- The Whole Truth executed high-impact OOH marketing by wrapping 17 commuter buses in Mumbai with full-body ads, transforming daily commutes into mobile brand touchpoints

Catalyze Adoption

Social/video AD + QC Call-to-Action
(Paid Display, off-platform)

- Manyavar marketed on YouTube to generate buzz about its presence on quick commerce platforms like Zepto.



YouTube Advertisement

Off-platform bursts create the initial demand signal—making consumers **aware, curious, and primed**—so that on-platform levers can capture and convert that intent with maximum efficiency

Illustrative / Non-exhaustive

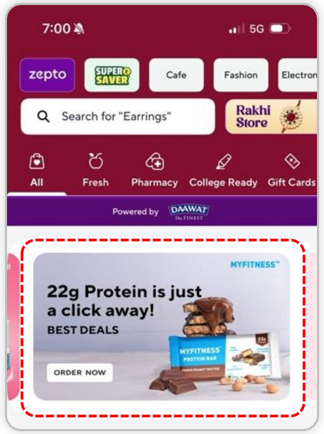
On-platform remains universally relevant, for both insurgents and established brands/ categories

Driving Visibility via On-Platform Levers

On-Platform Visibility Assets[1]

1. Ignite Consideration

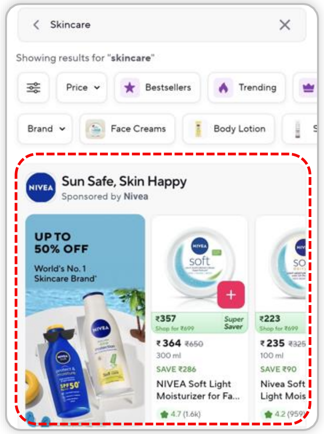
Homepage Hero Banner



Maximize homepage visibility to accelerate brand recall.

2A. Drive Action

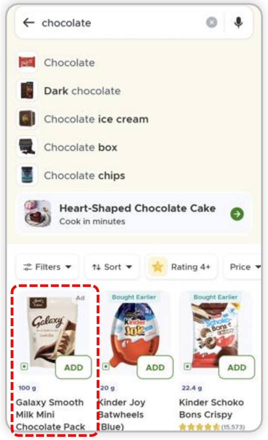
Category Header Takeover



Own category shelf-space to drive visibility during exploration.

2B. Drive Action

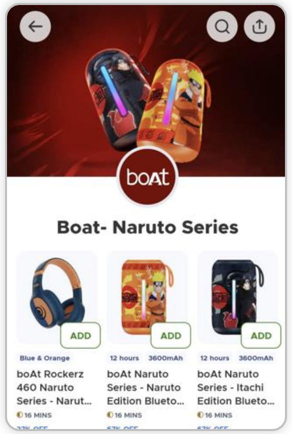
Search Optimized Product Pages



Target high-intent queries to capture demand at the point of decision.

3. Catalyze Adoption

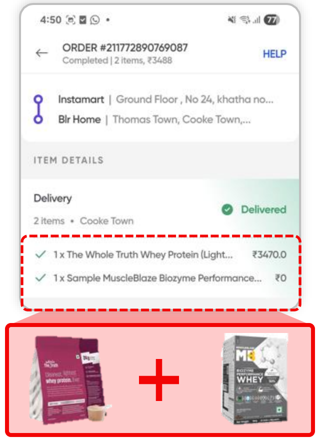
Brand Storefront/Microsite



Create immersive brand destinations within the platform.

4. Create Market

Sampling



Offer risk-free trials to jump-start adoption and drive repeat purchase

Note(s): *1. The list is not exhaustive*

Illustrative

Gamification on QC is gaining traction and could emerge as a key engagement driver

Gamified Brand Engagement on Quick-Commerce Platforms

01 Gamified Co-branded Modules

- A **co-branded endless-runner game** integrated into Instamart's app funnel **to create buzz around Vadilal's new gourmet tubs** and deliver a timed discount coupon.
- **Top-of-funnel awareness** for a legacy ice-cream brand in quick commerce

instamart | Vadilal

02 Gamified Contest Activations

- **Quick commerce platforms** enabled consumers to chase rare Oreo Pokémon designs through fast reordering, supported by **high-visibility banners and time-sensitive offers**
- **Fast deliveries triggered immediate unboxing and content sharing,** amplifying excitement and driving organic buzz around the contest.

zepto | instamart | blinkit

Platforms use **gamified ad formats** to (i) deliver differentiated awareness in a crowded feed and (ii) lock in repeat behaviour through reward-loop mechanics

07

Win spike days with event-led agility

Quick commerce lets brands win small, sudden demand surges through agile, low-effort activations

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QC offers the unique ability to target a wide range of events, including impulse and recurring mini-demand events

Quick commerce events segmentation – split by demand predictability

Brand's Ability to Target Events

✓✓ High ✓ Moderate ✗ Limited

Event segment	Examples	Quick Commerce	Other Commerce Channels[1]
01 Impulse Events High ROI if responded to effectively	• Heatwaves, Rainy Days, Cold Spell • Viral social media trends • Weekend Binge Nights • Late Night Ordering, etc.	✓✓	✗
02 Recurring Mini-Demand Events Drive medium-term demand spikes and brand engagement	• Payday weekends, • Month-End Grocery • School Reopening • Wednesday Midweek deals, etc.	✓✓	✓
03 Anchor Events & Festivals Largest share of annual spike revenue	• Diwali • Holi • Raksha Bandhan, Karva Chauth, Eid, Christmas, NewYear • Independence Day, Republic Day • Valentine's Day, IPL, etc.	✓✓	✓✓

QC is the only channel that can convert moment-based intent into real-time GMV

Precision-targeting across predictable cycles allows brands to build loyalty

Note(s): *1. Other commerce channels include E-commerce (Excl. Quick commerce), modern trade and general trade*

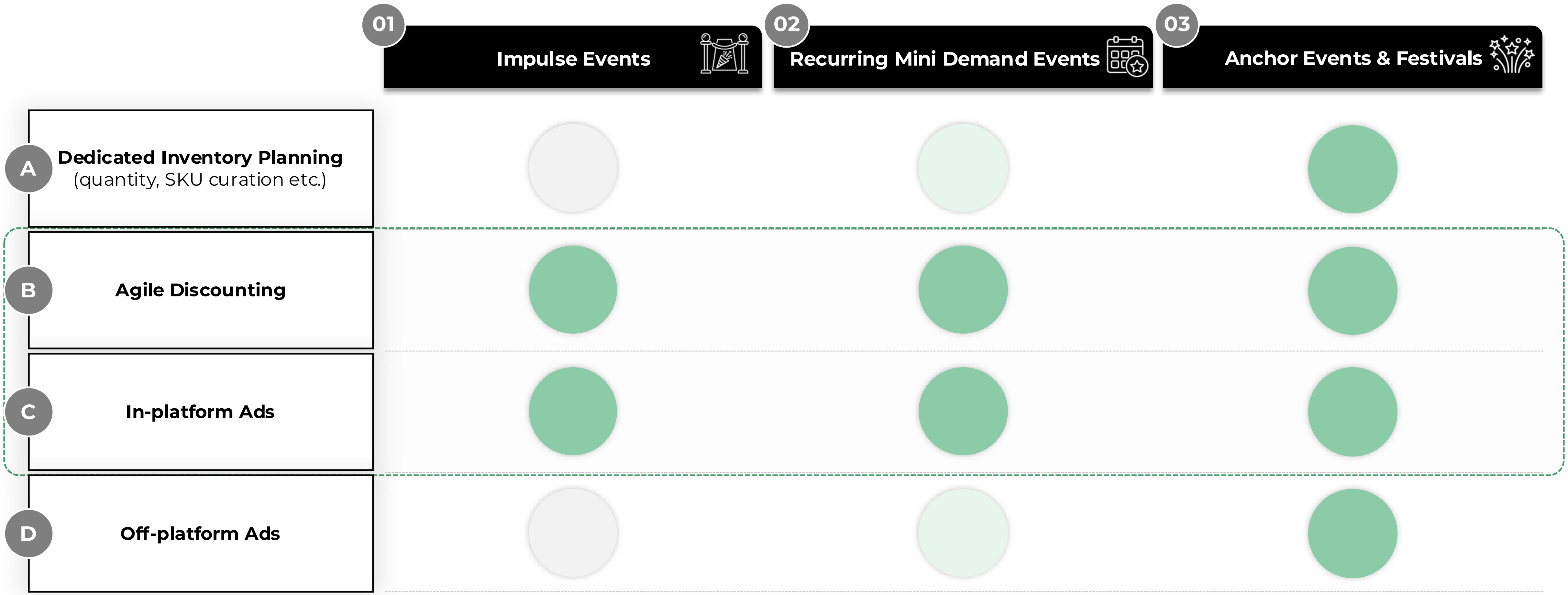
Indicative

These events can be targeted with relatively low-effort and planning

Planning & execution efforts by brands to win spike days – by types of events

Extent of Planning & Execution Effort

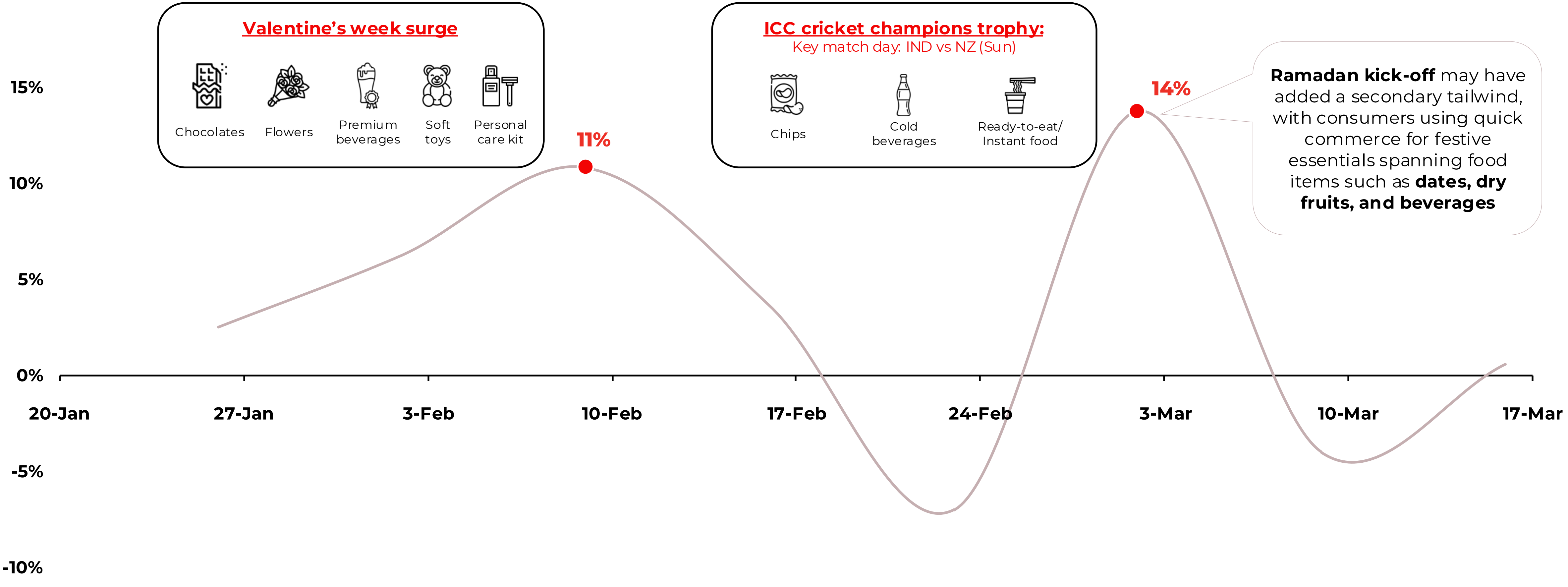
Low — High



The resulting spikes are sharp and provide clear revenue upside opportunity for brands

GMV growth trend - Leading quick commerce platform

Week-on-week growth %, Week-ending Date 2025



Deploy an agile team, paired with responsive supply chain engine

- QC account management is uniquely intense
- Ownership spans multiple functions: platform relationships, catalogue & content, supply chain, and digital marketing
- Agile supply chain is critical to enable the real-time actionability

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QC account management is a different beast – requires daily firefighting

Account Management – QC vs E-commerce

	Quick Commerce	E-commerce (Excl. Quick Commerce)
Speed & Cadence	• Hour-to-hour changes; daily or multiple daily performance reviews	• Weekly/monthly reviews; changes planned weeks in advance.
Assortment Strategy	• Tight, high-velocity SKU set	• Deep catalogue; includes niche, and long-tail SKUs
Inventory Management	• Distributed across 1,000s of dark stores • Requires micro-fulfilment visibility and rapid replenishment	• Centralized in few warehouses; bulk supply, easier to manage stock.
Promotions & Pricing	• Short-burst promos	• Longer planned promos (weeks/months ahead)
Visibility & Merchandising	• Highly pay-to-play, limited real estate • Constant fight for top placement	• Mix of organic + paid visibility • Strong product details, reviews etc. can sustain organic ranking
Data & Measurement	• Real-time metrics such as out-of-stock %, days of inventory, share of search; yesterday's data is considered "old".	• Longer-term KPIs (category share over months, ad ROI over time, review base growth).
Cross-platform efforts	• Limited differentiation among platforms leads to constant race for replicating efforts	• Clearer platform positioning allows more targeted and creative brand strategies
Brands Team's Focus>	**Rapid daily decision-making, high-velocity hero SKUs, and hyper-local inventory accuracy.**	**Long-term planning, broad assortment depth, and sustained visibility through content, reviews, and promotions.**

Responsibilities are typically spread across 3-4 key roles, structured as per brand's portfolio breadth and scale of QC business

Key roles for effective QC Account Management

Key Roles part of QC Account Management Team...

A. Commercial & Relationship Management

- Manages commercial targets
- Oversees platform relationship and key campaign rollouts

B. Catalogue & Content Management

- Manage SKU onboarding
- Content management (images, descriptions)
- Algorithm-driven slot optimization

C. Supply Chain & Inventory Planning

- Maintain optimal DOI targets Ensure timely replenishment
- Prevent stock-outs
- Optimize dark store inventory

D. Digital Marketing

- Liaise with media agencies
- Plan promotions
- Assess campaign ROI
- Recommend adjustments based on data insights

...Typically aligned in the following structures

Category-oriented Structure

Relevant for multi-portfolio brand requiring significant category / sub-brand level decision making (e.g. FMCG conglomerate)

Platform-oriented Structure

Relevant for brand with a focused portfolio and sizeable QC business or having ambition to grow QC business (e.g. innerwear or beauty brand)

Dedicated QC teams

Central digital-commerce team

Relevant for emerging brand (e.g. D2C) or legacy brand with emerging QC focus (e.g. apparel or toys brand)

Indicative / Non-exhaustive

The appropriate team needs to paired with agile supply chain capabilities for industry-best execution

Agile Supply Chain – Best Practices

01	Strong data loops & collaboration with Platforms	• **Regular Sell-Through Reports**: Automate ingestion of platform sales + stock data into the planning system • **Event-Based Spike Readiness:** Pre-align inventory for predictable surges (weekends, IPL, festivals) in advance • **Joint Demand Planning**: SKU-led planning with platform supply chain teams
02	Micro-demand Forecasting	• **Granularity:** Forecast by platform + city + dark store cluster • **Shorter cycles:** Daily or 2–3 day rolling forecasts using platform sell-through data • **Trigger-based replenishment:** Create replenishment alerts when inventory dips below X days of cover per store.
03	Agile Replenishment Capabilities	• **Near-Store Warehousing:** Hold QC inventory in platform-linked micro-warehouses or distributors located close to dark stores • **Smaller, More Frequent Drops** • **Hybrid Push-Pull Model:** Push core SKUs regularly but pull via platform demand signals for volatile SKUs. • **Flex Logistics Partners**: Have multiple B2B logistics tie-ups to avoid platform stockouts when one partner's capacity is tight.
04	Packaging & Pack-size Adaptation	• **QC-friendly packs**: Smaller, easy-to-pick packs that fit dark store shelving standards. • **Shelf-Ready Packaging (SRP):** Reduce handling time with cases that can be directly shelved. • **Durability:** Products must survive high-touch, high-speed handling without damage

Expert Quotes

"We are deeply engaged with all platforms, as we do with any other customer. These platforms are growing faster than the overall e-commerce channel. For instance, I've spent a whole day with a key partner to explore ways to increase and grow categories within their channel. I've also visited dark stores to understand their operations"
-Executive, Leading FMCG Brand

"The demand forecasting is far more stable in a marketplace versus quick commerce. And, therefore, you have to have different fill rates of products. We realised that the back end and logistics and supply and demand planning has to be different"
-Executive, Leading FMCG Brand

"We are now servicing quick commerce with stock replenishment almost every alternate day as compared to one-two times a week for ecommerce"
-Executive, Leading FMCG Brand

"Quick commerce dark stores keep an inventory of not more than three days. Distributors can't fill this; only a direct connection can, on a replenishment basis"
-Executive, Leading FMCG Brand

"Quick commerce helps us earn better profits because customers buy premium packs, while our distribution costs are lower. This channel gives us higher margins through selling more expensive, premium items"
-Executive, Leading Oral Care Brand

Glossary (1/3)

Conversion Rate	US$1 = ₹85
Metro Cities	Metro includes top 8 cities with a population over 5 million, comprising of Mumbai (Maharashtra), Delhi (NCT), Bangalore (Karnataka), Chennai (Tamil Nadu), Hyderabad (Telangana), Kolkata (West Bengal), Pune (Maharashtra), and Ahmedabad (Gujarat)
Retail Market	Comprises purchase of products across categories, including grocery, fashion, electronics, pharmaceuticals and over-the-counter medication, beauty and personal care and general merchandise
General Trade (GT) / Unorganized Retail	Comprises the purchase of goods through small, independent outlets with minimal standardization and regulatory oversight. It includes Kirana stores, local vendors.
Modern Trade (MT) / Organised B&M	Includes the purchase of goods with large-scale, standardized operations, professional management, and regulatory adherence which provides better product assortment and access to the consumers. It includes chain stores, supermarkets, hypermarkets, malls, etc.
Branded Market	Comprises products sold by national brands (Pan-India), direct-to-consumer (D2C) brands, and regional brands
Legacy Brands	Brands belonging to a company that has an offline distribution presence in three or more regions (each region defined as North, South, East, West, and Central) in India and had a revenue of more than INR 100 Cr in FY24 (excluding D2C brands)
New-age / D2C Brands	Brands with a large portion of their sales from online channels (more than 50%) and have own website/app
Unbranded Market	Products that lack distinct branding and are typically sold without a proprietary label, often sourced from manufactures and sold under various retailer or distributor names
Quick Commerce	Hyperlocal Players who deliver retail groceries (fresh foods like fruits & vegetables, meat, dairy etc., staples and packaged foods), fashion, electronics, beauty and personal care, and general merchandise, home/ kitchen goods and pharmaceutical products) to consumers within 30 minutes
Ecommerce (Excl. Quick commerce)	Refers to online product sales through horizontal marketplaces (Amazon, Flipkart, Meesho, Snapdeal), vertical marketplaces (Myntra, Nykaa), and brand-owned websites or apps of digital-native and traditional brands, while excluding quick commerce platforms, offline sales, and service-based e-commerce.

Glossary (2/3)

Insurgent Brands	Challenger brands that typically target niche consumer needs and have a sharp differentiation;
Regional Brands	Primarily dominant in one or two states, catering to local preferences and maintaining a strong regional footprint
Fresh	Fresh includes fruits, vegetables, meat, seafood, dairy, and other perishable products
Staples & FMCG	Staples & FMCG includes grains, pulses, packaged foods, beverages, toiletries, cleaning supplies etc. excluding personal care & baby care consumables
BPC	Consists of beauty and personal care products such as Makeup, Hair Care, Skin Care, Fragrances Personal hygiene, Oral Care, Deo & fragrances etc.
Electronics	Include Mobiles, Electronic Accessories, Large and Small household Appliances.
Large Appliances	Include refrigerators, washing machines, ACs, TVs, home entertainment systems, etc.
Small Household Appliances	Include water heaters, vacuum cleaners, air purifiers, ironing/heating devices, kitchen & cooking appliances, and personal care gadgets.
Electronics Accessories	Include mobile covers, screen protectors, chargers, cables, headphones, adapters, smartwatches, and batteries.
Fashion	Includes apparel, footwear and accessories (belts, bags, watches, hair accessories, wallets, wearables, scarfs & stoves, caps & hats etc.)
Furniture	Includes core household furniture such as beds, sofas, wardrobes, dining tables, chairs, study/work desks, storage units, and cabinets
Home Décor & Furnishing	Includes home textiles and décor items including curtains, carpets, rugs, cushions, bedding, mattresses, wall décor, lighting, decorative pieces, kitchenware, and tableware
Pharma	Pharma (includes OTC) includes ePharma and over-the-counter drugs

Glossary (3/3)

General Merchandise	Includes, Toys, Baby Care, stationery, office supplies etc.
Jewellery	Ornaments made from precious metals, gemstones, or other materials, worn for decoration or cultural significance. Includes items like rings, necklaces, earrings, and bracelets
Coffee	Includes instant, filter coffee, flavoured instant, roasted beans, ground coffee, cold brew, and ready-to-drink beverages
Sauces	Sauces include tomato ketchup, mayo spreads, peri-peri, Schezwan, soy, mustard, BBQ, pasta sauces, Asian stir-fry, and curry bases
Male Grooming	Include razors, shaving creams, beard oils, face wash, body lotions, fragrances, and hair removal products
Bakery Products	Include cake mixes, brownie mixes, pancake batters, frosting, ready-to-bake cookie dough, baking powders, cocoa powders, premade pie crusts, and dessert toppings
Skincare	Includes face washes, moisturizers, serums, sunscreens, face masks, toners, scrubs, under-eye creams, lip balms, cleansing oils, anti-acne treatments, and night creams.

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Thank You

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