



# The Quick Commerce Playbook

India 2025





# Foreword

*India is undergoing a retail revolution. With the promise of under 30-minutes delivery, Quick commerce is not merely a new channel; it is a structural shift in how consumers shop, brands operate, and investors allocate capital.*

*According to latest industry reports, Quick commerce has grown from ~\$1.5 billion in 2022 to ~\$6-7 billion in 2024, scaling at a breakneck speed. With a projected ~40% CAGR through 2030, it is set to outpace most consumer internet sectors. By contrast, e-retail is forecast to grow at a steadier ~18% CAGR. Quick commerce already contributes nearly 10% of India's e-retail market. It is expected to double its share to 20% in just five years, unlocking a \$40-50 billion opportunity.*

*There are multiple factors driving this surge—rapid adoption of digital payment with UPI transactions growing at 57% Y-o-Y, a digital-first, young consumer base, and the rise of dual-income urban households that are putting convenience above cost. At the same time, platform innovations like AI-led demand forecasting, warehouse automation, and*

*dark-store expansion have made scale and profitability attainable.*

*Quick commerce presents both an unprecedented opportunity and a pressing challenge for brands. Consumer journeys have become shorter, more impulsive, and highly frequency driven. Availability and recall outweigh reviews or detailed content. Winning in this environment demands sharper assortment strategies, precision in visibility, and agility in supply chain execution. Parallely, platforms have also evolved into powerful retail media ecosystems, creating new opportunities for monetisation, insights, and personalised engagement.*

*The Quick commerce Playbook 2025 helps brands decode this complex, fast-evolving ecosystem and offers them a roadmap to rethink discovery, conversion, and retention levers.*

*Quick commerce is no longer an experiment. It is the future of retail in India. The time to adapt, invest, and lead is now.*



**Lalatendu Das**

Chief Executive Officer,  
Publicis Media South Asia

# Foreword

## *It's the era of Doorstep Retail: Gear up for the Quick commerce Flywheel*

India has moved from days to hours to minutes - and in doing so, it has become the epicenter of the global Quick commerce story. Today, Quick commerce contributes nearly 10% of India's e-retail market and is set to double to 20% - or \$40-50 billion - by 2030. This is not a passing trend. It is a structural shift redefining how consumers buy, how brands engage, and how business growth is measured.

What makes this journey distinctive is not just speed, but scale. With 20M+ active shoppers, and coverage across 70+ cities, the sector is normalizing instant gratification as a cultural expectation. The festive season magnifies this shift. Consumers are not just buying essentials - **gifting and FMCG together account for over two-thirds of festive Quick commerce baskets, while impulse hampers and curated premium packs are powering last-minute celebrations.**

Importantly, more than 70% of marketers now believe **trust in premium and luxury categories can be built on Quick commerce if authenticity cues are strong.** And with nearly half allocating over 20% of their retail media budgets here, it is clear that Quick commerce has become marketing mainstream.



**Moneka Khurana**

Country Head & BOD,  
MMA Global India

*This Quick commerce Playbook 2025, developed in partnership with Publicis Commerce, is designed to provide a strategic roadmap for marketers: on how to win the "Find-Shop-Repeat" cycle, unlock discoverability in cluttered platforms, and turn Quick commerce into not just a sales driver but a sustainable growth engine.*

*At MMA Global India, our mission is to help marketers advance their ability to create value and deliver business impact. In light of which Quick commerce becomes integral to decode and is an integral part of our retail media narrative - a critical ecosystem where marketing, technology, and consumer behavior converge. So are you ready to adapt quickly and be a part of a revolution that's shaping the future of global retail - from India outward? What's next -*

- *Disruption through specialization (licious-style verticals - be it in segments like home, healthcare or lifestyle)*
- *Growth through deep brand collaborations and joint launches*
- *Transitioning Quick commerce from a pilot platform to a core engine*

*Glad to bring to the community a go-to resource to help gear up for the Quick commerce flywheel effect which is bringing the aisle home. Stay Qcommitted to Qcelerate your journey.*



# Executive Summary

Quick commerce, or Q-commerce, represents the next evolution in digital retail—offering near-instant delivery of everyday essentials, often within 10 to 30 minutes. Unlike traditional e-commerce, which typically operates on delivery timelines ranging from next-day to several days, Quick commerce is built on hyperlocal fulfillment models, dark stores, and real-time inventory management. This enables platforms to meet consumer expectations for speed, convenience, and impulse-driven purchases, especially in urban and semi-urban settings.

Globally, Quick commerce is in its green season, with India emerging as a standout market. Over the last 2-3 years, India has recorded over 100% year-on-year growth in the sector, outpacing mature economies such as China and the United States. This explosive growth is driven by India's unique macroeconomic and digital landscape—marked by a rapidly expanding base of digital-first consumers, accelerated urbanization, widespread smartphone penetration, and pan-sector digitization.

India's Quick commerce ecosystem is now among the most vibrant globally, with a high concentration of startups, robust investor confidence, and significant capital inflows across both horizontal platforms (serving multiple categories) and vertical platforms (focused on niche segments). Blinkit, Zepto, and Instamart have emerged as the dominant players, collectively controlling over 85% of the market. These platforms are no longer just delivery channels—they are now integral to the distribution strategies of large FMCG brands.

Quick commerce has become a meaningful contributor to brand topline, with several FMCG players attributing around 10% of their category revenues to these platforms. This shift is not just about sales—it's also about media. Advertising on Quick commerce platforms has seen a meteoric rise, with top brands estimated to have earned USD 340

Mn. from ads alone in 2024. Ad revenues on these platforms are already 25% of those generated by leading marketplaces like Amazon and Flipkart combined.

From a brand perspective, advertising budgets for Quick commerce have grown dramatically—from just 5% a few years ago to nearly 30% today. This reflects a fundamental shift in perception: Quick commerce is no longer a subset of e-commerce but a standalone channel that demands dedicated strategy, investment, and optimization.

Consumer behavior on Quick commerce platforms is notably different from traditional e-commerce. Shoppers tend to be more intentional, with limited browsing and evaluation phases. Purchases are often driven by immediate need or impulse, and influenced by factors such as packaging, delivery charges, and convenience. Moreover, category demand varies by time of day and occasion—chocolates see spikes in the afternoon, while beverages like tea and coffee perform better in the morning. Festive and sporting events also drive category-specific surges.

For brands, this means that success on Quick commerce platforms hinges on being available at the right time and place. Strategic levers such as assortment planning, pricing, day-parting, and contextual visibility are critical to driving consideration and conversion. Optimizing these factors not only enhances immediate sales but also builds long-term consumer loyalty and repeat purchases.

In conclusion, India's Quick commerce sector is not just growing—it is redefining how brands engage with consumers. As the ecosystem matures, brands that invest in tailored strategies for Quick commerce will be best positioned to capture market share, drive topline growth, and stay ahead in an increasingly competitive digital landscape.

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# 1. INTRODUCTION TO QUICK COMMERCE

# 1.1 Understanding Quick Commerce

With the promise of under 30-minute delivery, Quick Commerce has emerged as the next-generation retail model — blending the convenience of e-commerce with the immediacy of hyperlocal fulfillment. Powered by dense dark-store networks, real-time inventory, and hyperlocal delivery fleets, it has transformed the consumer journey from days to minutes, making convenience the new currency of choice.

India stands at the forefront of this revolution — driven by high population density, rapid Tier-1 and Tier-2 expansion, and consumers' growing preference for instant gratification. To decode how brands are adapting to this shift, the "State of Quick Commerce" Survey

captured insights from 54 industry leaders across brands, and media ecosystems. The survey was conducted by Publicis Commerce in association with MMA Global India revealing how Quick commerce has evolved from an experiment into a mainstream pillar of omnichannel growth.

As the ecosystem matures, the focus is shifting from speed to sustainability — from chasing order volumes to building profitable, data-driven, and brand-led growth. The coming phase of Quick commerce will belong to players who master efficiency, experience, and ecosystem collaboration in equal measure.



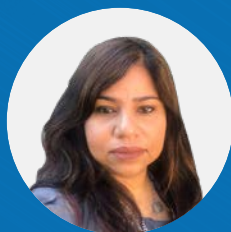
## Setting the Stage : Quick Commerce

*“Consumer retail has come of age, and Quick commerce is the face of it. From ‘Shelf to Screen to Speed’, ‘Quick commerce’ is quite the phenomenon, that has brought about certain irreversible shifts to the consumer and retail landscapes. More than two-thirds of all e-grocery orders and one-tenth of e-retail spend happened on Quick commerce platforms in 2024-25. It appears as if ‘Quick commerce is NOT as much a retail touchpoint as it is a consumer cash-flow solution’.*

*The proverbial demise of the ‘monthly grocery list’, now replaced by weekly, bi-weekly, sometimes even daily ordering rituals. Juxtaposing this with increased nuclearization of families & subsequent*

*shrinking size of the pantry storage, Quick commerce has prioritized “micro-moments” - capturing consumer intent, with a hyperlocal focus, instantly! And with all major Indian cities presenting traffic snarls and poor infrastructure challenges; running errands and grocery shopping trips are far from being pleasure-able excursions, the Quick commerce proposition stays compelling.*

*We have all witnessed some glaring statistics about the de-growth of share of sales across categories, from physical channels - the ubiquitous general trade and organized modern trade have witnessed a decline, ~2.5 lac general trade outlets faced shutdowns, across metros and large Indian cities.”*



**Anushree Ghosh**

General Manager and Head  
of Digital & Performance Marketing

*“The digital eco system has been fast evolving than ever before. Covid19 catalyzed the change drastically, where consumers did a lot of test and learn with digital ecommerce. The positive purchase experience led to growing confidence of the consumers, so much so that now consumers are willing to buy non grocery items from the QComm platforms.*

*While the metro consumer has made QComm purchase part of their daily habit, the Tier2 and Tier 3 cities are yet to see that surge and change. Qcomm players have also started to monetize the loyal*

*base, by opening advertising avenues, just like any other media platform. However, to drive further sustained growth and profitability the base has to increase, which will come from the non metros.*

*The QComm players need to have a differential strategy in smaller towns, where more than convenience, price may be a driver. While players have started to work towards that, it will need more pull than push in these markets. Something extra has to be offered to the consumer in these markets, which will drive a habit change.”*



**Taranjeet Kaur**

VP Media, Digital Marketing  
& Brand PR, Tata Consumer Products,  
MMA Global India Member

# Setting the Stage : Quick Commerce

*"The rise of Quick commerce has fundamentally reshaped our inventory planning approach. Unlike traditional e-commerce, this channel demands real-time visibility, agile replenishment, and hyperlocal stocking based on dynamic consumer behavior.*

*We now plan inventory around day-part trends, smaller pack sizes, and*

*high-velocity categories suited for impulse buying. Close collaboration with platforms and the use of predictive analytics help us stay responsive and ensure availability where and when demand peaks.*

*It's not just about speed—it's about being relevant and ready in the moment of purchase."*



**Rajiv Dubey**

Vice President - Media & Brand Activations,  
Dabur India Limited, MMA Global India Member

*"Platforms are focused on building and evolving the ecosystem. They draw insights from global markets, analyze consumer behavior, and localize strategies to suit Indian consumers.*

*Agencies, on the other hand, are deeply involved in driving performance, whether that's through SEO, paid media, content optimization, or campaign execution.*

*Brands, especially in the CPG space, have undergone significant*

*transformation over the last 7-8 years. E-commerce has fundamentally changed how consumers discover and purchase products. That, in turn, has reshaped how brands think about channel strategy and distribution.*

*What's most exciting now is the phase of collaboration. Platforms and brands are partnering more closely to deliver better consumer experiences—whether that's faster delivery, better assortment, or a more seamless purchase journey."*



**Sahil Jain**

Paid Media Lead, India & SEA  
Kimberly-Clark

”

# 1.2 The Quick Commerce Revolution

## 1.2.1 The Global Context

Quick commerce (Quick commerce) is no longer a niche experiment; it is shaping up to be one of the most transformative shifts in retail worldwide. **Globally, the market is projected to grow from \$170 billion in 2024 to nearly \$283 billion by 2030<sup>1</sup>, underscoring the sustained demand for immediacy and convenience in consumer behavior.**

India, however, is emerging as the standout growth story. With the sector reaching revenue of ~\$6-7 billion in FY2025 and grow at 40% annually until 2030.<sup>2</sup>

For brands, investors, and platforms, this trajectory signals more than just rapid growth—it marks a structural redefinition of how consumption will evolve in India. With its young demographics, rising digital adoption, and the cultural tilt toward instant gratification, India is positioned not only as a growth engine but as the laboratory for global innovation in Quick commerce .

### Country-Wise Footprint of Quick commerce (in \$Bn)

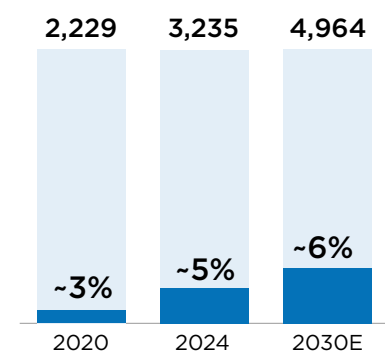
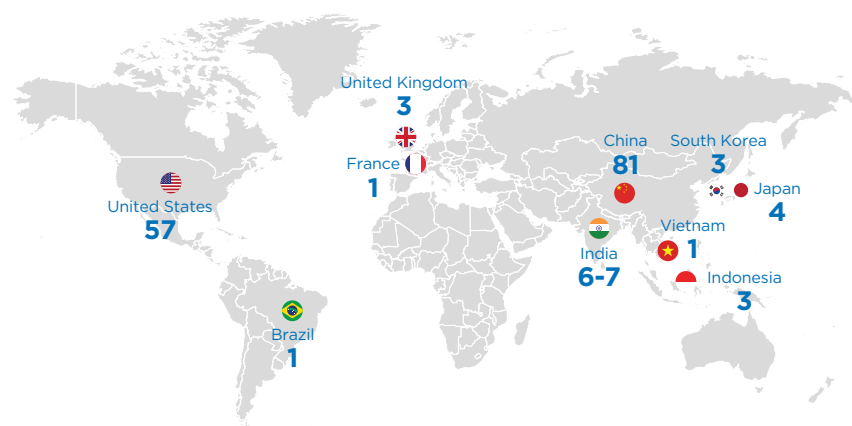


Figure 2: Quick commerce is growing steadily globally, and is expected to reach 6-8% of E-Retail by 2030 (Statista)

Figure 1: Current Indian market stands at 3-4% of global Quick commerce market with CAGR of 110%, 2022 - 25

## 1.2.2 The India Story

India is rapidly emerging as the epicenter of Quick commerce , with growth that outpaces most global markets. **Today, Quick commerce already accounts for nearly 10% of India's e-Retail market, underscoring its strong foothold in the country's digital commerce ecosystem. This share is expected to 20% of e-retail market by 2030 which is ~\$34 - 40 billion.<sup>3</sup>**

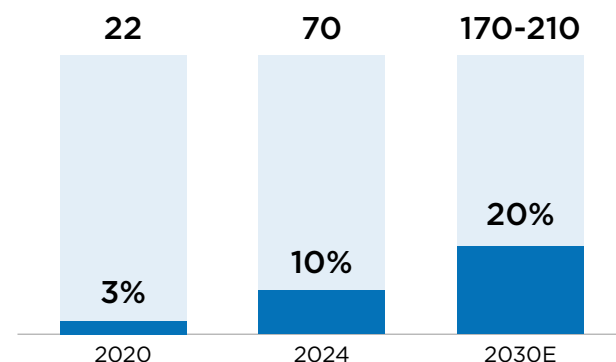


Figure 3: Today, Quick commerce makes 10% of total e-retail market. However, with evolving consumer behaviour normalizing instant deliveries, it is expected to capture 20% of the e-retail market in the next 5 years (Redseer, Bain & Company)



**20M+**

Active Shoppers



**40%**

CAGR (2024 - 2030)



**70+**

cities covered today

(a) All numbers in USD Bn, unless mentioned otherwise

# 1.3 Inside the Surge of Quick Commerce

## 1.3.1 Rising Faith In Online Platforms



**Digital Adoption Surge:** Internet usage is growing at 8% YoY<sup>4</sup>, expanding the base of online shoppers.



**Trust In Transactions leading to Higher Order Frequency:** UPI transactions growing 57% YoY highlights growing dependency on online payments, making digital purchases seamless<sup>5</sup>. Therefore, rising confidence is converting into higher order frequency and platform adoption.



**Category Shift Online:** With growing trust, high-frequency and impulse categories such as beverages, and packaged foods—are migrating rapidly to Quick commerce.

## 1.3.3 Technology & Logistics Innovation



**Rapid Network Expansion:** Dark stores have grown at a 70% YoY pace, reflecting the sector's relentless push for market coverage.



**Revenue Uplift:** Average per-store revenue rose by 25%, demonstrating stronger unit economics and more efficient use of real estate and inventory.



**Optimizing Operations Through Innovation:** Intelligent zoning, advanced demand forecasting, and automation at scale have been the critical enablers of revenue uplift and rapid network expansion.

## 1.3.2 Evolving Consumer Behavior and Demographics



**Demographic Dividend:** 70% of population will be of working age by 2030<sup>6</sup>, boosting disposable incomes and convenience-driven spending.



**Digital-First Lifestyle:** India's median age is ~29 years<sup>7</sup> with persona of being digitally savvy. Thus mobile-first generation accustomed to apps, UPI, and on-demand services being main drivers for Quick commerce growth.



**Instant Gratification:** Shoppers increasingly value speed & convenience over cost, preferring ultra-fast fulfillment. This is fueling the "I want it now" mindset normalizing ultra-fast delivery a buying criteria.

## 1.3.4 Urban Lifestyle & Demographics



**High Density in Top Cities:** India's tier 1 cities have enough population density to sustain dark-store economics



**Dual-Income Households:** Tight schedules and limited time making convenience a priority for consumers specially for routine tasks like buying groceries and personal care products



**Smaller Homes, Lower Storage:** Encourages more frequent, smaller basket purchases

Source(s): <sup>3</sup>Bain & Company, PwC India, <sup>4</sup>Meta Study

# 1.4 Capitalizing on Speed: The Investors Ecosystem

The global Quick commerce landscape today spans ~210 active players, of which 88 are venture-backed, having collectively secured nearly \$30 billion<sup>9</sup> in funding from venture capital and private equity investors.

In the last decade, Quick commerce startups in **United States have received the highest funding among all countries - \$7.94 billion followed by India securing \$6.85 billion<sup>9</sup>.**

India offers one of the most attractive environments globally, with -



**1.4.1 Favorable demographics:**  
~43% of population under 25, vs. ~30% in APAC peers<sup>10</sup>



## 1.4.2 Ecosystem Momentum:

The expansion of India's digital economy, rising Tier-2+ consumption, and growing e-retail penetration are accelerating growth opportunities for consumer brands.



## 1.4.3 Quick commerce as a Growth Engine:

With ~30% growth in D2C funding, Quick commerce has emerged as a critical scaling channel—for instance, Slurrp Farm doubled its FY23-24 revenues, with Quick commerce contribution increasing 6x.<sup>10</sup>

### Total funding across countries in Quick commerce (in \$Bn)

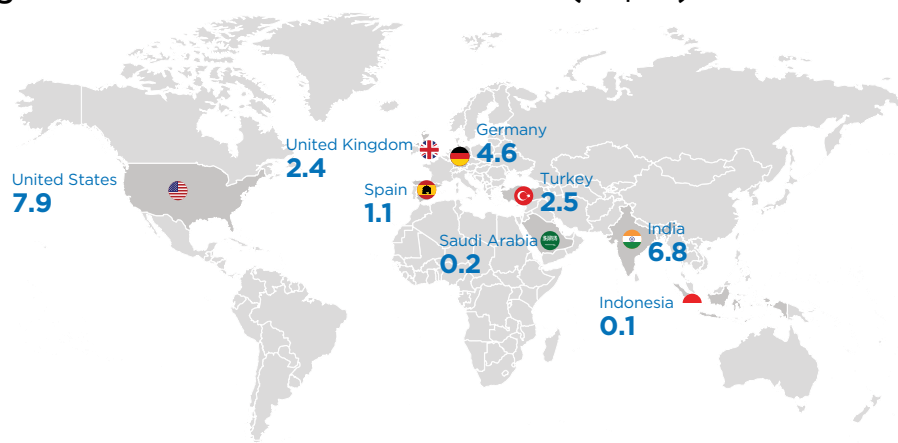


Figure : Total funding across countries in Quick commerce In the last 10 years

## 1.4.4 Specialized Quick commerce as Emerging Focus Area

With current established platforms sweeping grocery market, food and fashion are the next big interest areas as emerging Quick commerce verticals. To continue to reign the current Quick commerce market across the verticals, platform giants have already started to jump into specializations.

Food, fashion, and online pharmacies are at the center of this shift—categories where speed plus assortment can unlock repeat usage and premium monetization. For investors, this signals a decisive pivot: the real winners of Quick commerce will not just be those who deliver fast, but those who **scale smart, specialize deep, and monetize beyond baskets.**






Company	Vertical	Round Raised	Amount Raised
	Food	Series A	\$ 14 M
	Fashion	Series A	\$10M
	Fashion	Seed	\$4.5M
	Fashion	Seed	\$3M
	Fashion	Seed	\$250K

Figure : Recent funding rounds have shown Investors' interest pivoting towards specialized Quick commerce services mainly Food and Fashion. This leaves an opportunity areas around other untapped verticals where Quick commerce might prove revolutionary (<sup>9</sup>Entrepreneur, <sup>10</sup>Tracxn)

# **2.**

# **QUICK COMMERCE MARKET LANDSCAPE**

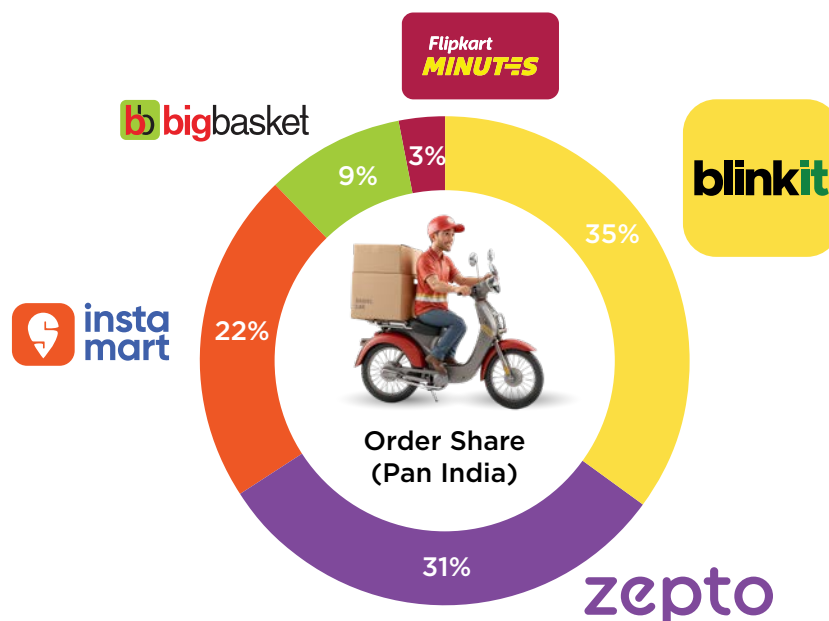
## 2.1 The Race for the Fastest Delivery: Market Share of India's Quick Commerce Leaders

India's Quick commerce market has shifted from an impulsive convenience play to a mainstream retail battleground. With 4,000+ dark stores, and presence across 70+ cities<sup>2</sup>, Quick commerce is no longer a niche—it is the fastest-growing retail channel.

**Blinkit, Zepto, Instamart** are the flag bearers of Quick commerce in India today with **over 85% of the market share** in terms of daily

order volume. These volumes have nearly doubled for Blinkit and Zepto since they first started scaling in 2022.

A mark of validation of the impact of Quick commerce comes from, grocery products that account for the bulk of these orders across the 3 leading platforms where FMCG products are seeing the highest traction.

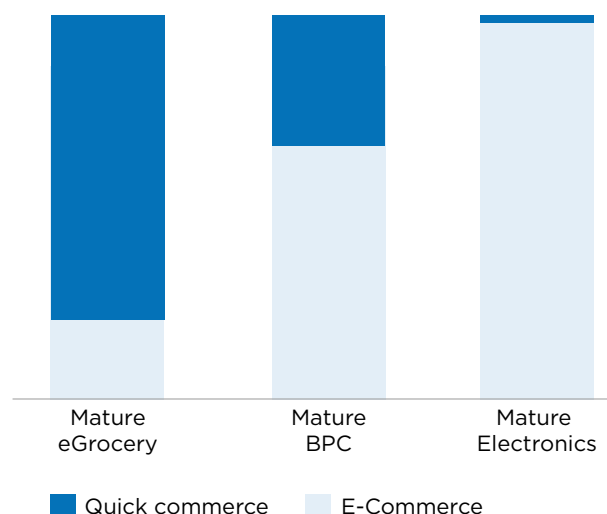


Quick commerce market share based on order volume (daily orders/ day) <sup>13</sup>  
Source: Moneycontrol, Business Standard

### FMCG brands are leaning increasingly on Quick commerce

FMCG brands are currently the top gainers from Quick commerce platforms with **30-60%<sup>14</sup> online sales already being driven by Quick commerce** resulting in new packaging and distribution strategies. Leading FMCG brands are already experiencing >30%<sup>14</sup> of their F&B sales coming from Quick commerce, while others in the ice cream business state that 8-10% of all their sales are from Quick commerce<sup>14</sup>

### Category Sales Mix - E-Commerce vs Quick commerce






\*Mature brands include those who have 80-90% of their product portfolio also available on Quick commerce

Source: Media Reports

## 2.2 The Race for the Fastest Delivery: Key Performance Indicators

Platform Performance Matrix: Benchmarking Active Quick commerce Players

Category			zepto	
Established	2021 (was Grofers in 2013)	2020	2021	2022
AOV (USD)	6-7	5-6	4-5	4-5
MTUs (Mn, latest known)	5.4	4.5	4.04	NA
Number of SKUs	~25,000	~5,000	~14,000	~6,000
Cities present	199	126	76	28
Number of dark stores (latest known)	1,594	1,103	1,201	715
Ad Revenue (USD Mn, FY24)	~45	NA	~113	NA

Source: e4M, GobbleCube, Company Websites, Media reports

### 2.2.1 Tier 2 play to increase, but further penetration to be limited

With more than 150 cities now serviceable through these platforms, the market is expected to now expand beyond tier-1 cities to reach deeper into Indian geographies. Instamart has been a fast mover in this segment, expanding services to smaller cities like Udaipur, Warangal, Salem, Amritsar, and Kanpur. Even Blinkit is swiftly expanding to smaller cities such as Haridwar, Amravati, Alwar, and Ayodhya.

However, while expanding to non-metro cities, platforms must be able to address challenges of lower population density, stronger local preferences for product selections and lower digital maturity amongst users. For certain categories, growth has been sluggish beyond tier 2 markets (e.g. for ITC, growth on Blinkit, Zepto and Instamart, in tier 3 pincodes during AMJ'25 was under 10%) resulting in shifting focus of platforms on densification and increasing share of wallet indicating a caution for brands to concentrate efforts on tier 2 markets only in the medium term

### 2.2.2 Revenue mix evolving with scale

As platforms scale, they are also focusing on improving monetization strategies to ensure long term growth and sustainability of their businesses. In addition to increasing take rates, platforms are also betting on product markups, advertisements and promotional placements and offering subscription or membership services. Fee-based revenues (convenience fees, delivery charges, etc.) are emerging as a major growth engine, with take rates rising sharply—from 7-9% in FY22 to 14-18% in FY25<sup>8</sup>, effectively doubling in three years.

At the same time, advertising is becoming the new profit pool. Ad income has grown 2.5X YoY<sup>2</sup>, and with more brands investing in Quick commerce visibility, advertising revenues are projected to reach parity with traditional marketplaces within the next 3-4 years. This positions retail media as a defining lever of profitability for Quick commerce platforms.

## 2.4 The Race for the Fastest Delivery: Emerging New Players

India's Quick commerce arena is no longer just the domain of "pure-play Quick commerce startups". Big horizontals, niche verticals, and non-grocery players are also now making strategic entries, increasing competitive pressure.

### 2.4.1 Strategic Implications of New Entrants



#### Category specialization:

Fashion, food and online pharmacies are turning into new competitive fronts. Those able to ensure fast delivery along with premium assortment will be able to capture customer loyalty and position themselves as category leaders.



#### Asset leverage:

Players such as Reliance, Amazon, have existing infrastructure, brand equity, and capital. Their entry raises the bar on dark-store density, fulfilment automation, and fulfilment efficiency.



#### Rise in customer expectations:

As more players promise delivery in minutes beyond the grocery category, speed will gradually become a basic expectation as an online shopping parameter. Consumer behavior will accordingly shape to choose platforms basis brand, assortment and service reliability.

Thus, players who will understand the correct mix of fast delivery + premium assortment + ad monetization strategy, will lock in higher margins.

### 2.4.2 Horizontal Players



is piloting in metros, with Walmart backing and grocery integration. It already contributes to 3% of total Quick commerce landscape



has emerged as the Quick commerce arm for Amazon, expanding to cities like Delhi, Bangalore and Mumbai

### 2.4.3 Vertical players



is experimenting with 30-minute delivery of beauty and personal care in Mumbai



continues to drive urgency-led consumer health deliveries through collaborations with Swiggy Instamart



launched MyntraNow a 30-minute fashion delivery service currently running Bengaluru, Mumbai, Delhi NCR and Hyderabad.



launched Ajo Rush a 4-hour delivery service across six cities including Mumbai, Delhi-NCR Bengaluru Hyderabad Chennai and Ahmedabad



offers medicine delivery in under 30 mins across key metro cities through captive app as well as in partnership with leading platforms like Zepto

## 2.5 The Other Side of Speed: Move Fast and don't Break Things

### Is Quick Commerce Incremental for your Brand?

Only a minority of respondents saw quick commerce revenue as net incremental. Most industry respondents feel that quick commerce is a channel shift, and net revenues are not significantly changing. Therefore, the way that many brands are looking at investment on quick commerce is also a re-prioritization of channel spends.

For large FMCG brands, quick commerce is imperative to maintain their market share as consumers switch between channels. Given that they are also able to maintain better margins, investing in quick commerce becomes a no-brainer for any established D2C brand.

For D2C brands, however, there is a bit of nuance. Quick commerce is a good fit for D2C brands which are (assuming that there is a strong category fit also):

- Not present across other channels, as it allows them to reach new audiences
- Premium brands, as it allows them to reach premium audiences at the point of sale
- Significant at local/regional scale and are trying to consolidate their dominance

### Sustainable Growth beyond Tier 1 Cities yet to be proven

Urban growth is nearing saturation, and future viability depends on how efficiently players can replicate the model in cost-sensitive, low-density markets without diluting consumer experience.

Expansion into Tier-2 and Tier-3 cities will require network redesigns, category localization (e.g., staples, dairy, regional snacks), and franchise or aggregator models to keep costs viable.

### Commission Inflation is Real

Platform take-rates are rising as players chase profitability. For D2C brands, platform commissions alone can eat into **5-25%** of a brand's revenue. Additionally, the cost of gaining in-app visibility - through advertisements, carousels, or merchandising - can account for another **18-20%**, usually charged as marketing fees. For some sellers, this can result in a **30-40%** commission being paid to the platform. Established FMCG companies, however, are in the much lower **10-20%** range.

### Private Labels will Redefine Competition

Platforms are sitting on granular demand and pricing data—making them perfectly placed to launch private labels in high-margin categories (such as grocery, snacks, beauty, and beverages). As BigBasket and Amazon have shown, private labels can quickly capture **20-40% of category share**, directly competing with partner brands on price and placement.

### In-App Visibility Costs are Escalating

Gaining in-app visibility is increasingly expensive — sponsored carousels, banners, and search boosts now consume up to **20% of revenue** in some categories. Additionally, **88% survey respondents expect media costs to rise further in the next year, indicating a coming phase of cost pressure and competition for visibility**. Brands must evaluate ROAS (Return on Ad Spend) and adopt smarter content + targeting to justify spend.

### Overdependence on Platforms = Data Blind Spots

Most platforms limit access to granular customer or performance data. Without control over insights, brands lose visibility into who their buyers are and what drives repeat behavior — weakening both CRM and retention strategies.

# **3.**

# **CONSUMER BEHAVIOR ON QUICK COMMERCE**

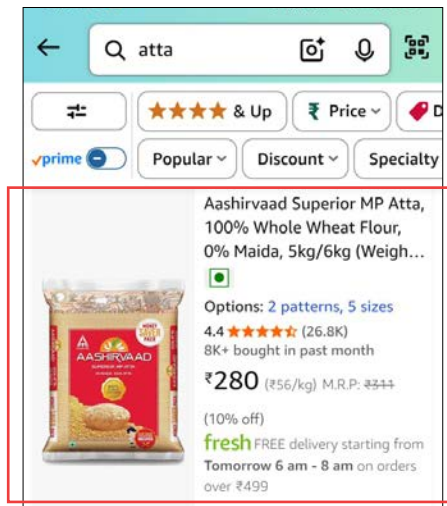
# 3.1 E-Commerce vs. Quick Commerce – Divergent Consumer Journeys

E-COMMERCE		QUICK COMMERCE	
AWARENESS & DISCOVERY			
<ul style="list-style-type: none"><li>- Discovery through planned search, ads, SEO, influencer marketing, and recommendations.</li><li>- Consumers typically explore platforms (Amazon, Flipkart, Myntra, etc.) when they have a specific need.</li><li>- Brand awareness is built through long-form digital campaigns, product detail pages, reviews, etc.</li></ul>		<ul style="list-style-type: none"><li>- Discovery is often contextual and impulse-driven</li><li>- Awareness is triggered by app notifications, in-app carousels, hyperlocal ads, outdoor branding etc.</li><li>- Visibility is often SKU-level (e.g., “Soft drink” or “Ice cream”) rather than full brand storytelling.</li></ul>	
Consideration & Evaluation			
<ul style="list-style-type: none"><li>- Strong focus on detailed product information, reviews, ratings, seller reputation, and price comparisons</li><li>- Time is available for browsing alternatives and wish listing</li></ul>		<ul style="list-style-type: none"><li>- Limited evaluation — consumers usually decide within seconds</li><li>- Trust is derived from platform reliability (e.g., Blinkit, Zepto) more than detailed product data</li><li>- Fewer substitutes shown, limited shelf-space</li></ul>	
Purchase Decision			
<ul style="list-style-type: none"><li>- Driven by best price, offers, brand trust, and delivery promise (1-3 days)</li><li>- Often bulkier baskets with higher AOV</li></ul>		<ul style="list-style-type: none"><li>- Driven by speed, immediacy, convenience, and stock availability nearby</li><li>- Basket size is still improving with AOV comparatively on the lower side</li></ul>	
Post Purchase & Engagement			
<ul style="list-style-type: none"><li>- Heavy on emails, app notifications, feedback requests, loyalty programs.</li><li>- Returns &amp; replacements structured but can be lengthy.</li></ul>		<ul style="list-style-type: none"><li>- Minimal engagement beyond delivery.<ul style="list-style-type: none"><li>- Returns mostly not allowed (except certain SKUs)</li></ul></li><li>- Engagement continues via push notifications, gamification (streaks, coins), and discounts on repeat orders</li></ul>	

## 3.2 'Distinctive' is the New Way to Unlock Conversion

1

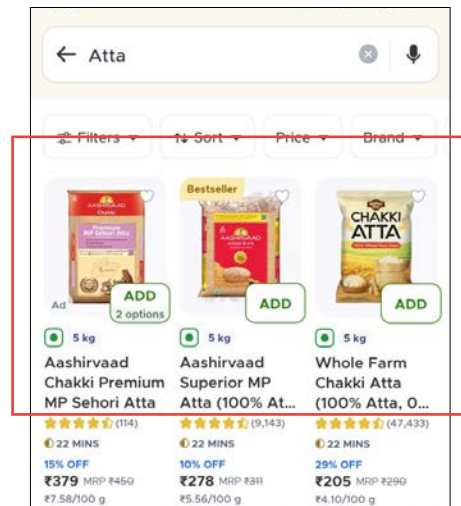
**E-Commerce**  
(‘Atta’ on Amazon)



E-commerce provides both ratings and quantity bought in the last month to potentially influence positive customer purchase Decisions

3

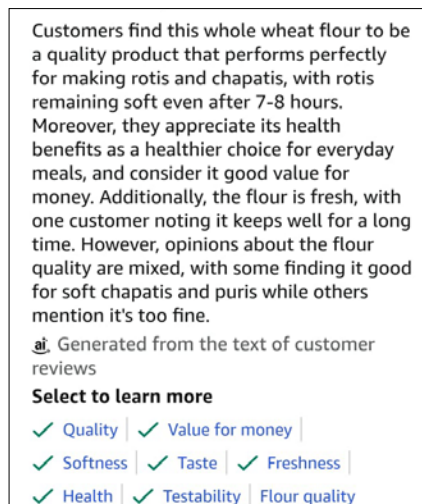
**Quick commerce**  
(‘Atta’ on Blinkit)



Quick commerce has recently included ratings across categories, in addition to hero images for SKUs indicating an inclination to allow brands to differentiate through content

2

**Customer Review**



Additionally, E-commerce also provides analysed reviews with qualitative nuances around customer experience with both the purchase and product quality. These inputs further impact customer purchase decisions



**Content to be distinctive is the next big opportunity**

Our consumer survey suggests 50% of respondents indicated they would switch to another Quick commerce platform to find the same product or brand, rather than considering alternatives. Furthermore, 70% said they would search for the same product or brand on Amazon or Flipkart if it was unavailable on Quick commerce platforms. Only 5% were willing to wait for the item to return in stock. These findings suggest that consumers prioritize immediate availability and brand familiarity over platform-specific content or reviews.

**Hence, the role of content is even greater drawing consumer attention through hero images and titles to influence positive purchase outcomes**

Source: Amazon, Blinkit

## 3.3 The Rise of Just-in-Time Purchasing

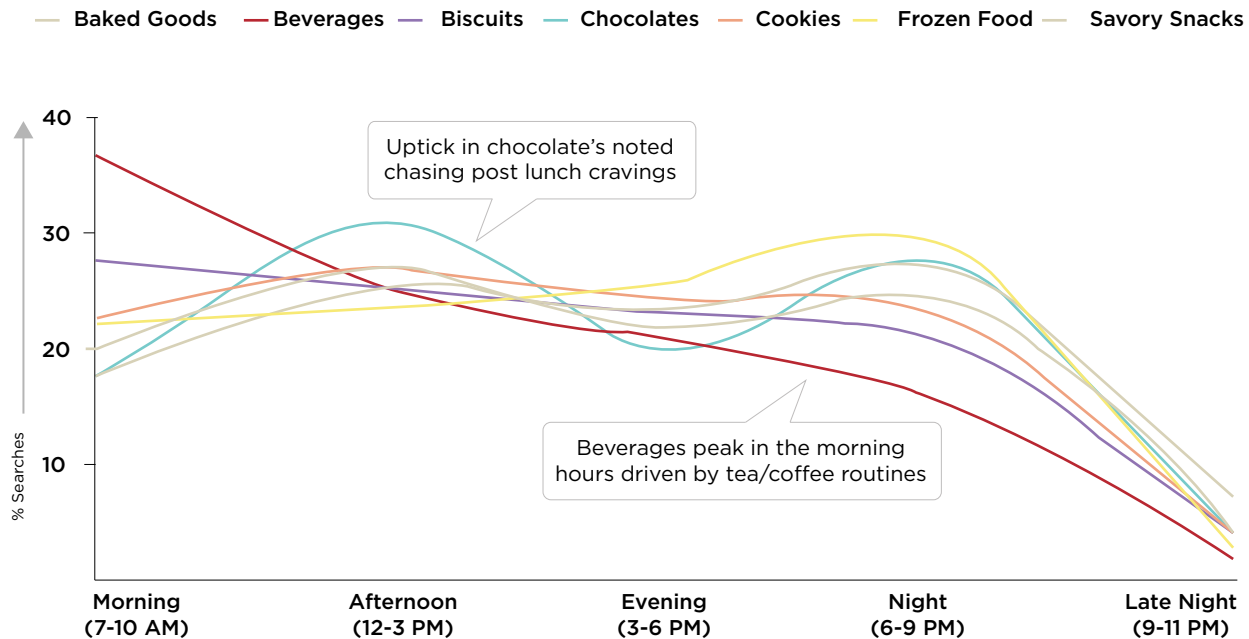


Figure : Consumer traffic for high-frequency food categories such as beverages and snacks fluctuates sharply across the day, with beverages spiking in the morning and late evenings, and snacks peaking during afternoon and post-dinner hours (Source: Blinkit)

### Moments matter for shoppers

Thanks to the sub-30-minute delivery promise offered by these apps, consumers are now making fewer pre-planned purchases and buying as and when the need arises. As a result, platform traffic and purchase behavior on Quick commerce platforms are very spiky in nature. The weekday/weekend traffic spike is much sharper on Quick commerce compared to other e-commerce platforms.

More importantly, the intra-day traffic exhibits sharp spikes, especially so for categories in foods and grocery. For example, the majority of purchases on staples happens during the early morning (breakfast) and early evening (dinner) slots corresponding with when food is being made in households. Conversely, categories like chocolates see spikes in the afternoon and dinner slots, presumably as consumers crave a sweet treat after their meals.

This shift is even more evident when it comes to planning around events. For example, while gift buying for Diwali on Amazon starts around 1 week before the festival day and peaks 2 days before the festival, on Quick commerce the maximum buying happens on the day of the festival itself. Not only does this change the media budgeting, but it also means that demand forecasting on Quick commerce is crucial to maintaining availability during key periods.

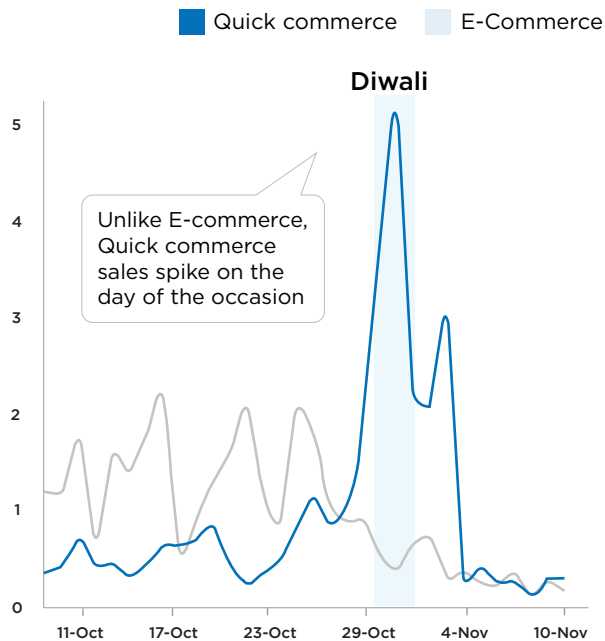


(a) Categories presented are non-exhaustive

## 3.4 'Festive' Events Win Big on Quick Commerce

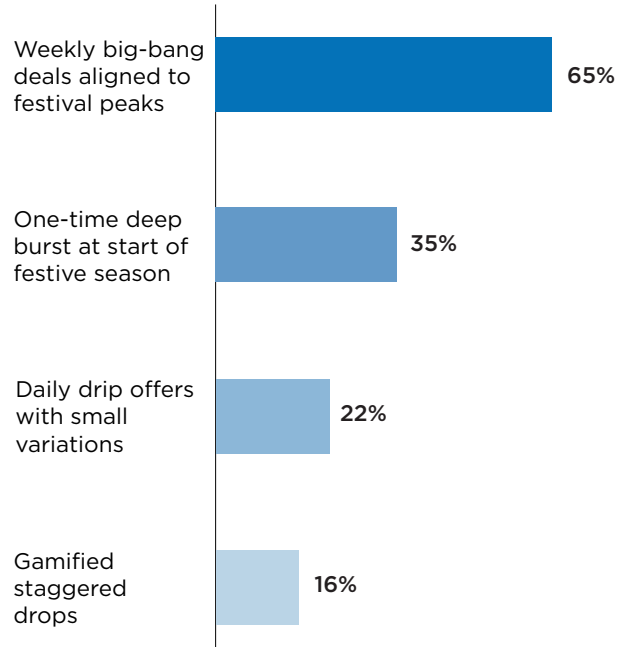
### Impact of Diwali events - Luxury Gifting Product

Daily purchase trend (%) , Oct-Nov 2024



Source: MMA Global India's Unpacking Quick Commerce in the Festive Season Survey 2025

### Promotional Cadence for Consumer Engagement



The “MMA Global India's Unpacking Quick Commerce in the Festive Season Survey 2025”, conducted among 38 industry respondents across brands and media ecosystems, explores how festive purchase behavior, marketing priorities, and category dynamics are transforming. In essence, this survey captures the new festive reality — where speed, stock readiness, and smart media orchestration define who wins the consumer's moment of intent.

#### 3.4.1 Festive buying on Quick commerce is moment driven

Customer behavior on Quick commerce when it comes to festive buying is driven more by last minute purchases which lies in contrast to E-commerce where festive purchases start to spike a few weeks before the event. Survey results also corroborate that weekly big bang deals perform better on Quick commerce platforms as opposed to one-time deep bursts since purchases often involve

spontaneous and high-frequency, smaller-basket orders where weekly deals align perfectly with this last-minute, need-based purchase behavior.

Festive demand on Quick commerce is impulse-led, not planned. Platforms win by staging frequent, high-impact deal events that sync with last-minute buying behavior.

#### 3.4.2 SKUs purchased are still similar to that on E-commerce

Despite the impulsive nature of purchasing on Quick commerce platforms, gift packs and hampers see the strongest surge on both Quick commerce and E-commerce platforms. According to MMA Global India survey results brands have innovated on festive hampers fueling this by innovating in the indulgent categories—specifically luxury chocolates and premium snacks. This innovation centers on creating attractive, ready-to-gift SKUs that are compact enough for dark stores yet high-value enough to serve as a present.

(a) Q. Which promotional cadence has been found to sustain consumer engagement through the multi-week festive period without leading to fatigue? (N=38)

## 3.5 How can Brands Win?

### Quick commerce – Consumer Behavior Led Winning Levers

Takeaways for brands	Details	Actionable for brands
<b>1. Awareness</b>		
Awareness on Quick commerce is built off platform and not as much through repeated visibility at the point of need	<ul style="list-style-type: none"> <li>- Since users come to Quick commerce apps with high intent and frequency (often multiple times a week), awareness depends less on browsing and more on consistently showing up in sponsored slots, hero banners, and search results. The goal is mental reinforcement rather than exploration</li> </ul>	<ul style="list-style-type: none"> <li>- Since awareness on Quick commerce is built off-platform, brands should invest in retail media solutions to bridge external campaigns with in-app visibility, ensuring shoppers can easily find and convert on the platform</li> </ul>
<b>2. Consideration &amp; Evaluation</b>		
<p>Shoppers weigh convenience, speed, and trust when considering a brand</p> <p>The evaluation window is very short before purchase</p>	<ul style="list-style-type: none"> <li>- Optimized product content (images, descriptions, pack formats) and tailored promotions help consumers quickly place the brand in their basket</li> <li>- Consumers often compare just 2-3 alternatives before adding to cart. Differentiators like visible discounts, ratings, and clear USPs can potentially help nudge decisions</li> </ul>	<ul style="list-style-type: none"> <li>- Curate pack sizes and trial formats that fit Quick commerce missions (single-use, on-the-go, refill packs) to push inclusion into the consumer's consideration set</li> <li>- Keep the proposition sharp and front-loaded - competitive pricing, strong visual claims, and limited-time offers to tilt decision quickly</li> <li>- Regularly review and adjust content based on scroll depth insights</li> </ul>
<b>3. Purchase Decision</b>		
Impulse and basket-building dominate Quick commerce purchases	<ul style="list-style-type: none"> <li>- Add-on nudges and contextually relevant recommendations (seasonal items, "goes well with" bundles) drive incremental purchase</li> </ul>	<ul style="list-style-type: none"> <li>- Design cross-SKU promotions and bundle strategies that get triggered at checkout to maximize basket value</li> </ul>
<b>4. Post Purchase &amp; Engagement</b>		
Retention hinges on repeat purchases and reminders	<ul style="list-style-type: none"> <li>- Since Quick commerce platforms know consumption frequency (milk, snacks, beverages), they can prompt timely reorders and build loyalty through replenishment nudges</li> </ul>	<ul style="list-style-type: none"> <li>- Partner with platforms to utilize paid inventory for retention campaigns ("Reorder now," "Back in stock"), and offer exclusive SKUs/packs to strengthen repeat purchase behavior</li> </ul>

# **4. CATEGORIES ON QUICK COMMERCE**

# 4.1 Overview of Quick Commerce Categories

## 4.1.1 Grocery and packaged foods

Immediate utility products and low-involvement categories like grocery account for 46% of Quick commerce share. This behavior is also reflected in VTION datasets. Consumers tend to search for exactly what they need, purchase, and exit—rather than browse, compare, or add items to a wishlist.

Most grocery subcategories have doubled in size over the past year. Common subcategories like kitchen staples, dairy & eggs, and bakery & bread have consistently held strong shares on Quick commerce. Given the quick consumption nature of these products, the category continues to grow steadily.

Consumer purchasing behavior indicates that subcategories like packaged snacks, aerated drinks & juices, energy drinks, and oil & ghee have captured consumer attention, resulting in double-digit growth.

## 4.1.2 Beauty and personal care

In Beauty & Personal Care subcategories, skincare has the largest share of consumer purchases, followed by haircare. Over the past 12 months, consumers have driven significant growth in men's grooming, deodorants & perfumes, and makeup.

## 4.1.3 Home essentials, decor and improvement

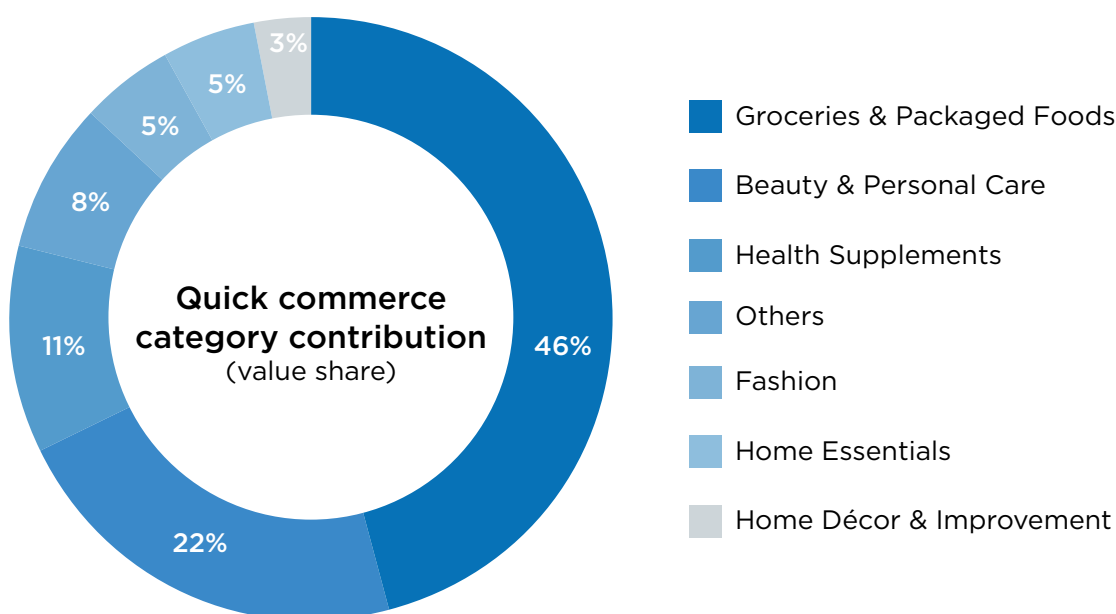
In Home Care subcategories, consumers continue to opt for cleaning supplies and laundry care on Quick commerce, which together hold the largest share. Increasingly, consumers are also turning to Quick commerce for air care needs, making it the fastest-growing subcategory—though it still holds a small share.

## 4.1.4 Health supplements

Health supplements are the third largest contributor to the Quick commerce pie by value. These include workout supplements like Whey protein, creatine etc. as well as natural supplements like Ashwagandha, Shilajit etc.

## 4.1.5 Fashion

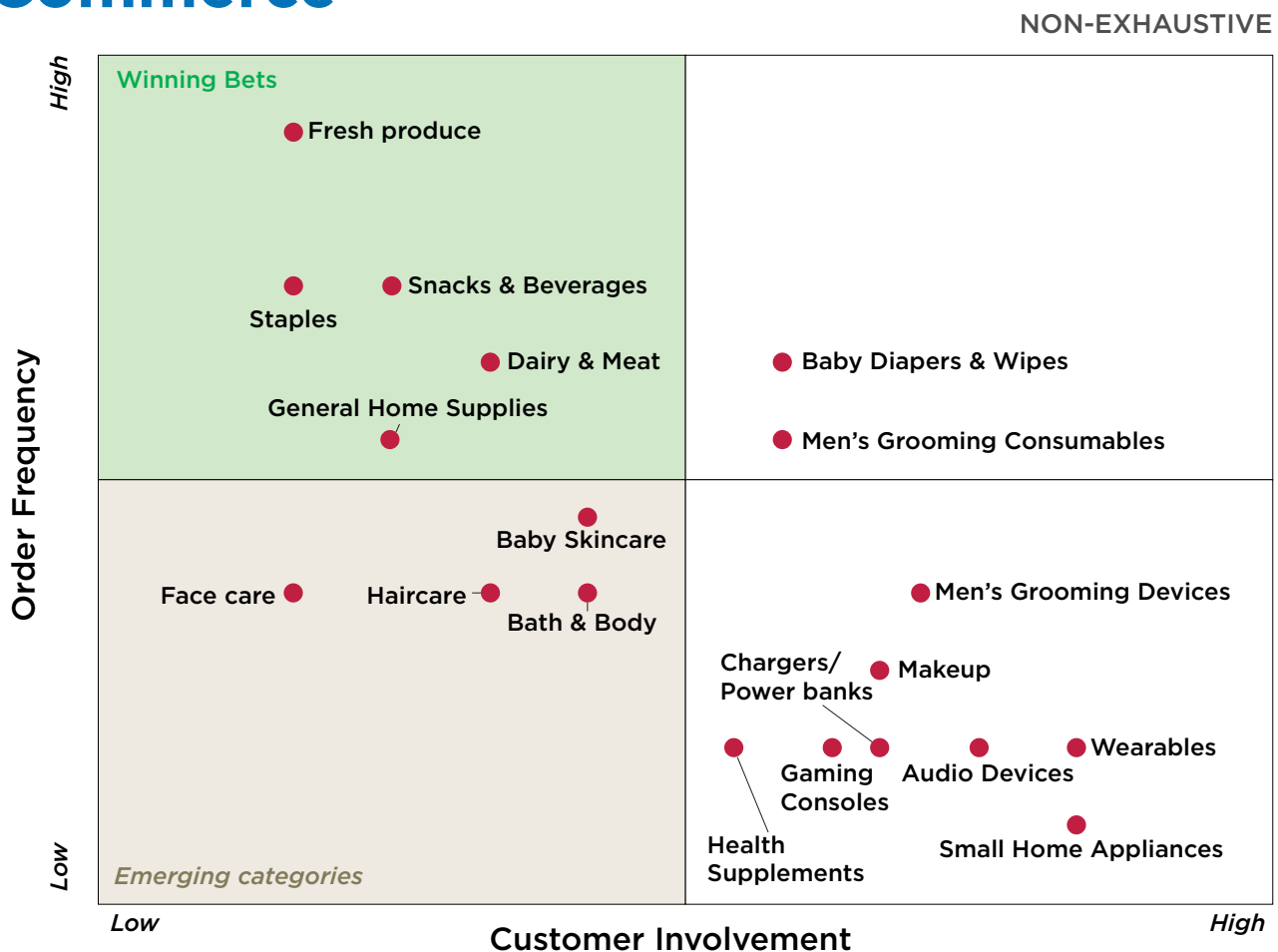
The fashion category has witnessed the fastest growth, driven by consumers increasingly relying on Quick commerce for fashion accessories and jewelry. In contrast, the main subcategories - apparel and footwear - involve higher consumer consideration for size and fit before making a purchase.



Source: Vtion

(a) Groceries include snacks & beverages, fresh produce, dairy & meat etc. (b) Beauty & personal care includes skincare, makeup, haircare and facecare (c) Home essentials include cleaning products, brooms, dust pans etc. (d) Others include categories like baby care, electronics, appliances etc.

## 4.2 Category Fitment for Quick Commerce



\* Staples include rice, flour, pulses, sugar etc.

### Low involvement, high frequency is a winning bet

High frequency, low involvement categories are destined for success on Quick commerce platforms owing largely to their low decision making effort. These are most compatible with Quick commerce with fresh produce, snacks and staples leading the charge. **Discounts and offers impact these categories the most** and are the primary decision drivers for customers.

Success for brands in these categories is **driven by availability and brand recall** since customer mindshare drives search on Quick commerce platforms and eventual purchase. It must be noted however, that these categories are likely to mature faster as platforms scale beyond key markets and

purchase decisions are likely to become even more ancillary factors such as delivery speed, quantity, additional charges etc.

### New opportunities will emerge with scale

As Quick commerce platforms are presently expanding beyond metro and tier 1 cities, it is expected that categories such as **haircare, facecare, bath & body etc. will gradually evolve into winning bets** as frequency of orders rise at the platform level and both access and last mile supply chains improve. A few categories such as **baby skincare products (e.g creams, lotions etc.) are also at the cusp of a breakout** as even metro / tier 1 shoppers are beginning to purchase these products online.

(a) Customer Involvement – Scored between 1 (Low) – 5 (High). Based on time spent by the customer to research, analyze, compare and evaluate products  
 (b) Order Frequency – Scored between 1 (Low) – 5 (High). Based on number of times the product may be ordered in a month through Quick commerce platforms  
 (c) Only select categories presented above

# **5. THE KEY LEVERS TO WIN ON QUICK COMMERCE**



# Strategizing Media on Quick Commerce

*A cohesive on and off platform strategy – This is crucial to leverage on the media multiplier effect*

*a. Synchronizing off-platform media campaigns be it brand storytelling or social campaigns, impact associations (both impact media or celebrity/influencer associations) with the on-platform search & visibility interventions, this can potentially bring down the overall cost of consumer acquisition and the total platform TROAS (Total Return on ad spends)*

*b. Finding your blue Ocean in ‘On platform search’ – This is an elusive goal and nearly impossible to hold on to, consistently. With too many brands trying to woo the same set of in-market users across platforms, it affects the cost of doing business on the Q comm platforms*

*Keywords that one can lead with, is an evolving set. Hold on to that ‘share of voice, share of shelf and interventions that drive conversion*

*ii. Consistent experiments on the most potent set of visibility assets, through the consumer journey that impact conversion and repeat purchases*

*iii Consistently experimenting with the listing content, keyword optimization, immersive FOP, BOP, Usage based content & excellence in managing ‘ratings & reviews’*

*c. Building a meaningful tech (AI) enabled superstructure for Growth*

*i. Autonomous AI agents that enable inter and intra platform allocation of demand generation variables*

*1. Performance marketing budgets*

*2. Merchandising/ visibility*

*3. Promo*

*4. Deploying and optimizing the above in real-time, can potentially improve platform TROAS by ~15-20%, thereby influencing share growth*

*ii This also includes agile on-platform campaign management in relevant day parts, days of the week, laying low when competition is hyperactive, and so on, at an SKU X dark-store level*

*iii Consistent monitoring of on shelf availability (OSA), Pricing, Promo and market shares for owned and competitive SKUs and corresponding Share of voice/shelf and conversion rates at dark store level can potentially bring out the RCA (root cause analysis) and opportunities to drive attributable and sustained growth.*

*Consistent Measurement & Metrics that matter - for brands across leader/challenger or new-launch archetypes, arriving at campaign strategies, deployment and optimization playbooks. This also includes analyzing the sensitivity of variables like performance marketing, price, promo and other interventions, on profitable business growth.*



**Anushree Ghosh**

General Manager and Head  
of Digital & Performance Marketing

# Strategizing Media on Quick Commerce

*Typically any digital video creative, in a media plan, either has a buy now option or know more option. There is a direct implication of digital media/marketing campaigns on Qcomm, where the call to action is leading to a Qcomm platform.*

*Layering media campaigns with Qcomm key days always helps drive more offtake on commerce. Ultimately the consumer has a ripple affect, just like in earlier days tv and print media strategy would compliment each other.*



## Taranjeet Kaur

VP Media, Digital Marketing & Brand  
PR, Tata Consumer Products,  
MMA India Member

### **Discoverability is the key for the impulse driven categories**

*Quick commerce has low salience to the business as confectionery category is impulse, although it is growing aggressively currently on back of NPDs and high price point SKUs. Discoverability is the key factor for us which helps in driving sales which needs to be solved for confectionery/impulse categories by displaying it at multiple touch points in the consumer's buying journey.*

### **Building Quick commerce Centric Products to Ride the Growth Wave**

*No brand/product currently depends on Quick commerce in our portfolio as Quick commerce currently acts as an additional platform, although with the high growths in Quick commerce, we plan to launch E-Commerce/Quick commerce centric products to piggyback on the growth trajectory of the channel.*

*The onset of Quick commerce has helped us in making our digital campaigns a 360-degree campaign by linking it to Quick commerce through purchase links & influencer promo codes.*

*The Quick commerce & other online channels behave in very similar way for the category, although consumers have higher affinity towards Quick commerce in occasions where delivery time is critical. Because most of our categories are not critical or high involvement categories, Quick commerce is not a critical platform for the category. However, there are occasions like Halloween/Birthday where purchases are driven by quick refill.*



## Gunjan Khetan

Director, Marketing,  
Perfetti Van Melle India,  
MMA India Board Member



# 5.1 Focus Areas for Winning on Quick Commerce



## FIND

### Make

it easy for consumers to discover the brand at the right place, & time



## SHOP

### Maximize

basket size at the time of purchase via pricing strategies & availability assurance



## REPEAT

### Build

habits and long-term value beyond the first purchase

## Key Parameters

- |                    |                |                 |
|--------------------|----------------|-----------------|
| • Assortment       | • Content      | • Loyalty       |
| • Organic Presence | • Pricing      | • Data Strategy |
| • Paid Media       | • Availability | • Re-Marketing  |

## Framework Application

By auditing performance in each stage, brands can identify where discovery efforts need amplification, conversion levers can maximize basket size, and retention strategies such as loyalty programs, can strengthen long-term value.

This framework acts as both a diagnostic checklist and a strategic roadmap, helping brands prioritize investments, align cross-functional teams, and continuously feed insights from repeat behavior back into discovery and conversion efforts.

	Assortment	Organic Presence	Paid Media
Key Message Build with granularity	<ul style="list-style-type: none"> <li>On Quick Commerce availability needs to be <b>managed for shorter cycles at each dark store</b></li> </ul>	<ul style="list-style-type: none"> <li>With limited exploration on Quick Commerce, ensure relevant SKUs are <b>organically ranking within the average category scroll depth</b> in each city</li> </ul>	<ul style="list-style-type: none"> <li>Product discovery on Quick Commerce is largely <b>search driven</b></li> <li>Media needs to be planned granularly as consumer intent in <b>every pin-code x time-slot is different</b></li> </ul>
Takeaways for Brands	<p><b>Re-orient supply chain</b></p> <ul style="list-style-type: none"> <li><b>Improve demand forecasting models</b> with predictive modelling/AI as inventory needs to be planned for shorter cycles and with much higher variance across festivals, events, weekends etc.</li> <li>Shift to dynamic PO planning (weekly/daily) to <b>align inventory with real-time demand and</b> equip supply chain to manage POs through automated processes.</li> <li><b>Listing coverage</b> to be ensured across all dark stores at SKU level</li> <li><b>Measure availability for each dark store</b> using third-party tools to track stock presence.</li> </ul>	<p><b>Build the sales flywheel</b></p> <ul style="list-style-type: none"> <li><b>Organically available means visible within average scroll depth</b> - For example, on Blinkit, consumers searching for staples on average buy on 1st fold while for personal care, average consumer scrolls up to the 3rd fold. Organic visibility beyond this is irrelevant.</li> <li><b>Increasing sales velocity improves organic rank</b>, role of content relevance is low unlike Amazon</li> <li>Hence it becomes crucial to <b>supplement organic visibility with paid</b> to drive sales.</li> <li>In case brand budgets are limited, <b>identify key time-bands where purchase intent</b> is highest and promote in that period. For example: staple food products tend to be purchased primarily during breakfast (6:00 – 9:00 AM) and evening (6:00 – 9:00 PM) slots as food preparation takes place then..</li> <li>After the organic rank improves, shift spends to long-tail or larger packs</li> </ul>	<p><b>Be agile on media</b></p> <ul style="list-style-type: none"> <li>Being agile on media requires the capability to respond at any granularity - hence <b>media plans must be set up at a SKU x keyword x geography x time-slot level</b>.</li> <li><b>Make your media retail aware</b> and be responsive to opportunities on the platform – for example if competition SKU goes out of stock in a geography, improving your SKUs organic rank, you can stop spends on paid media in that region.</li> <li>Manage granularity at scale through deploying <b>third-party retail-aware automation solutions to manage campaigns</b>.</li> <li>As awareness is being built off platform, brands need to build <b>360-degree campaigns harnessing the power of retail media</b> to drive sales. As per a recent MMA report, 49% of consumers discover new brands through retail media today and 1 in 3 brands have already</li> </ul>

	Content	Pricing	Availability
Key Message Build with data	<ul style="list-style-type: none"> <li>Brands must optimize mobile-first content to convert fast-scrolling shoppers</li> </ul>	<ul style="list-style-type: none"> <li>As Quick commerce drives premium, fuller carts, brands must leverage SKU-level pricing and moment-led discounting to maximize conversion</li> </ul>	<ul style="list-style-type: none"> <li>Availability is the new advantage for brands to grow through smart dark store execution</li> </ul>
Takeaways for Brands	<p><b>Hypothesize and test creatives</b></p> <ul style="list-style-type: none"> <li><b>Use a hypothesis based testing and timed creative refreshes</b> to understand the impact of different content elements, especially hero image and title on improving conversion rates</li> <li><b>On quick commerce, hero images should use:</b> <ul style="list-style-type: none"> <li><b>Clean, high contrast images</b> with minimum whitespace</li> <li><b>Enhanced FOP images</b> that clearly show pack size, variant, and usage context.</li> </ul> </li> <li><b>Product titles should be:</b> <ul style="list-style-type: none"> <li><b>Short, searchable, and benefit-led.</b></li> <li>Designed to help shoppers <b>quickly identify relevance</b></li> </ul> </li> </ul>	<p><b>Measure promo sensitivity</b></p> <ul style="list-style-type: none"> <li>Brands must <b>test SKU-level price sensitivity</b>, by measuring the impact on conversion rates</li> <li>Account for not just absolute discount but also relative to competition to see the real picture</li> <li>Moment-led categories respond better to <b>discounts than basket-led ones.</b></li> </ul>	<p><b>Map SKU priority by region and occasion</b></p> <ul style="list-style-type: none"> <li><b>quick commerce is no longer just for top-up purchases</b> - AOV is rising (₹500-₹1500) as consumers build fuller carts with premium products</li> <li><b>Prioritize top-selling SKUs</b> in their category specially the ones driving daily demand</li> <li><b>Map SKUs to day consumption occasions</b>, ex. morning consumptions surge for milk and cereals while for afternoon and evening, snacking and beverages may surge</li> <li><b>Align assortment with micro-market preferences</b> ex. Regional food brands and local snacks</li> <li><b>Work with Q-commerce partners to rotate assortment</b> dynamically basis the festive seasons and climate changes</li> </ul>

## 5.1.3. Repeat

	Loyalty	Data Strategy	Re-marketing
Key Message Build Collaboratively	Combine in-app triggers, cross-channel media, and data-driven offers	<ul style="list-style-type: none"> <li>• Capture granular purchase &amp; behavioral signals, and build predictive segments to effective retention and consistent repeat orders</li> </ul>	<ul style="list-style-type: none"> <li>• Combine in-app triggers, cross-channel media, and data-driven offers to re-convert browsers, and lapsed buyers</li> </ul>
Takeaways for Brands	<b>Leverage platform inventory</b> <ul style="list-style-type: none"> <li>• <b>Define the audience segment for</b> re-marketing depending on the typical purchase cycle for your category.</li> <li>• <b>Leverage media inventories that enable past buyer targeting</b> like Your-go-to-item Ads on Swiggy or recommendation Ads on Blinkit and targetable banners on Zepto.</li> <li>• <b>Offer promotional offers to past buyers</b> through user-targeted promotions on Zepto.</li> <li>• <b>Use inventories like CPAS ads and app notifications</b> to reach these audiences off-platform.</li> </ul>	<b>Get more/better data</b> <ul style="list-style-type: none"> <li>• <b>Leverage data analytics provided by platforms</b> like Zepto Atom and Blinkit Insights to measure key metrics across the customer funnel</li> <li>• <b>Complement platform data with third-party share of shelf tools</b> which can provide data on market shares, sales, pricing and availability for your as well as competitor brands.</li> <li>• Negotiate and <b>work with Q-Commerce platform partners for anonymized, aggregated data</b> for a deeper understanding of the customer patterns</li> <li>• <b>Build data pipelines to collate all platform data into brand-owned data warehouses</b> to build a deeper understanding of consumer behaviour.</li> </ul>	<b>Collaborate on NPD</b> <ul style="list-style-type: none"> <li>• As per our survey 60% of brands have launched/ launching products on quick commerce platforms, out of which almost <b>half the surveyed have reported successful new launches.</b></li> <li>• <b>Quick commerce platforms are collaborating with brands co-create new products</b> entirely for quick commerce. For example, Yu foods worked closely with Swiggy Instamart to create its Schezwan noodles.</li> </ul>

# 6. CONCLUSION

# Conclusion

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In conclusion, Quick commerce (Quick commerce) is not a radical reinvention of how commerce operates but rather a natural progression of e-commerce - one that capitalizes on consumer demand for speed, convenience, and immediacy. The core mechanics remain the same, but the pace, expectations, and platform dynamics have shifted dramatically. For brands, this shift represents both an opportunity and a challenge. On the one hand, Quick commerce allows for smarter, more agile inventory movement, especially through bundled offerings, geo-targeted campaigns, and more precise discounting. Brands can leverage these capabilities to improve margins, offload stock strategically, and respond faster to regional demand patterns. On the other hand, the platform environment is highly competitive, with leading players like Zepto, Blinkit, and Swiggy Instamart setting new standards for service, assortment, and advertising ROI. Traditional marketplaces are struggling to keep pace with the level of integration and customer-centricity that Quick commerce demands.

At the same time, platforms are evolving beyond mere logistics providers into media ecosystems - enabling real-time, retail-driven advertising experiences that are tightly linked to purchase behavior. Brands that tap into this shift and invest in retail media on Quick commerce platforms often experience a much shorter view-to-purchase cycle compared to conventional marketing channels. With product discovery on Quick commerce being largely search-led and confined to just a few top slots, visibility—especially in the first fold—has

become an essential driver of sales. And yet, media efficiency is still possible: Quick commerce's granular audience data and hourly-level targeting allow brands to invest with precision, avoiding waste and improving campaign ROI.

What's more, the space is ripe for innovation. While the generalist approach of selling everything under one roof has fueled growth thus far, the next wave of Quick commerce disruption may come from specialization. Just as Licious transformed meat delivery by building a focused, quality-first supply chain, there's room for similar players in categories like healthcare, home essentials, or lifestyle products. Such verticalization not only helps avoid category clutter but also builds stronger brand affinity and long-term customer retention.

Ultimately, the most successful Quick commerce strategies will be built on collaboration between platforms and brands. While neither party can unlock the full value of this ecosystem alone, together they can co-create more responsive, profitable, and scalable models. From joint launches and campaign integrations to data-sharing and loyalty programs, these partnerships are the foundation of future growth. Quick commerce is no longer an optional experiment— it's becoming a critical channel in the consumer's journey. Brands that treat it as a core part of their strategy, rather than an add-on, will be better positioned to capture market share, improve margins, and build deeper relationships with today's convenience-first consumer.

# 7. ANNEXURES

# Field Guides & Frameworks to Power Q-Commerce

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This block combines India-specific insights from MMA Global's collaborative reports and proprietary frameworks - CAP (Consortium for AI Personalization), MMGF (Movable Middles Growth Framework), BAP (Brand as Performance), and the Digital Maturity Framework - to sharpen quick-commerce decisions across availability, assortment, and activation.

## At a quick glance -

- The Q-Commerce report provides the path to profitability with first-party signals, rapid test-and-learn, and ONDC/kirana rails to decide what to list, where, and when.
- Learnings from our annual report frame Q-comm as both distribution and media. The CAP study can help operationalise AI-led personalization on retail-media surfaces.
- MMGF can help focus investment on persuadable “movable middles” for efficient growth.
- BAP enables hardwiring brand + performance outcomes into Q-comm placements.
- The Digital Maturity Framework stress-tests data, tech, process, and org readiness so festive spikes scale with discipline.

## CAP (Consortium for AI Personalization)

- Operationalise **1P + partner signals** to build **mission & micro-occasion** segments (e.g., last-minute gifting, party prep) across Blinkit/Instamart/Zepto.
- Activate **next-best-bundle/offer** and message variants in real time with CAP guardrails (privacy, fairness).
- Track beyond ROAS: **NTB, repeat rate, AOV, time-of-day conversion**.

## MMGF (Movable Middles Growth Framework)

- Prioritise the **persuadable “movable middle”** cohorts inside Quick commerce audiences for superior **incremental lift per ₹**.
- Apply MMGF to retail-media: bias budget to SKUs and geos where **mid-probability switchers** spike during festive windows.

## BAP (Brand as Performance)

- Design Quick commerce placements (search, spotlights, PDP takeovers) to **build memory while selling now**.
- Measure **both**: ROAS/CVR/basket adds **and** brand effects (NTB, branded search lift, repeat).

## Digital Maturity Framework

- Score Quick commerce readiness across **Data (1P capture & consent), Tech (feed hygiene, day-parting, automation), Process (PIN-code S&OP, stockout alerts), Org (NSM governance; retail-media × supply rituals)**.
- Close highest-impact gaps **before** festive surges (inventory sync, creative QA, bid rules).

# MMA Global's Retail Media Network Ideas Lab

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## What it is?

The Retail Media Network (RMN) Ideas Lab, convened by MMA Global (APAC; supported by MMA India), standardizes best practices and frameworks so marketers can make smarter, full-funnel retail-media investments - grounded in attribution, optimization, and budget allocation guidance, and built on the RMN premise of measurability, targeting, and rich first-party data. RMNs (retailers, commerce sites, super apps) span web, apps, and in-store surfaces, increasingly recognized as the "third wave" of digital; the channel is large and growing.

## Q-Commerce sits at the center

Quick-commerce apps function as RMNs (they're commerce sites/super apps), giving brands closed-loop signals and retail surfaces from awareness to conversion; the Ideas Lab explicitly focuses on full-funnel capability and codifying best-practice playbooks - exactly where Q-comm shines for mission-based, time-of-day, and micro-occasion tasks.

The Council's mandate - guidelines, frameworks, and full-funnel standards - directly complements our Q-comm findings and explorations in the report: it provides the cross-industry forum to validate activation norms (availability, assortment, retail-media formats), unify measurement (attribution and budget allocation), and scale India-first playbooks across Q-comm platforms.

Take our latest survey unpacking Q-Commerce in the festive season  
<https://www.surveymonkey.com/r/RJQHSQQ>

## Leadership & Industry Representation

RMNIL is led by a committee with **Anand Tilak**, Founder - Director, Periscope Singapore, as Project Director and publishes ongoing guidance/white-papers for the ecosystem.

## Committee members include:

- Ashutosh Srivastava, Founder and Chairman, Veros Ventures Pte Ltd
- Ken Mandel, Regional Managing Director & Head of GrabAds and Enterprise, GrabAds
- Lex Bradshaw-Zanger, Chief Marketing & Digital Officer, SAPMENA Region, L'Oréal Groupe
- Dhiren Amin, Chief Customer Officer, Income Insurance APAC
- Joe Nguyen, Senior Strategic Advisor, H+
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- Sean Cheng, Managing Director (E-Commerce) and Chief Omnichannel Officer, FairPrice Group
- Rohit Dadwal, CEO & BOD, MMA Global APAC | Global Head of SMARTIES WW

## Join the Council

Brands, retailers/RMNs, agencies, and measurement/tech partners can participate by writing to us @ [mmaindia@mmaglobal.com](mailto:mmaindia@mmaglobal.com). This plugs you into workstreams, best-practice exchanges, and upcoming outputs relevant to India's retail-media and quick-commerce agenda.

# D2C Advantage X Toolkit

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- Use D2C as the signal engine for Q-comm: Only ~12% of D2C ventures report profitability; when done right, D2C can deliver 8%+ operating margin and a ~4% revenue lift from 1P programs - use D2C learnings to pick winning festive bundles/SKUs before scaling on Q-comm.

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- Rails to extend reach fast (ONDC x kirana): HUL runs 16 brand.com sites, has UShop on ONDC, and enables hyper-local delivery via the Shikhar Seller app - blueprint for dark-store + kirana models in Q-comm catchments.

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- 1P data → PIN-code availability: D2C is the best route to 1P data; apply it to personalization, media targeting, and supply-chain planning by PIN code - then mirror into dark-store stocking and delivery SLAs on Q-comm.

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- Avoid “sea of sameness”: Marketplaces subsidise reach but compress distinctiveness; stage distinctive CX on D2C, then scale proven offers via Q-comm retail media.

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- Govern with NSMs: Successful brands anchor North Star metrics and org governance on sustainable growth - vital when festive Q-comm media ramps quickly.

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- Creative discipline > fancy DCO (without consistency): Consistent, high-quality creatives lift both mental availability and conversion - lock festive asset systems before peak.

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- Know your cost stack: Use the median D2C cost buckets and path to profitability views to set retail-media guardrails (TACOS/ROAS) for Q-comm.

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- Test-and-learn speed: D2C enables A/B tests on promotions, content, and bundling - port only winners to Q-comm hero slots during festive peaks.

# Key Contributors

We would like to thank all the leaders, who participated in our survey and interviews, for their time and valuable insights. In-depth discussions with these passionate leaders have helped us bring out real, on-the-ground perspectives.

We thank Vtion for being our research partner and sharing their insights.

We offer our sincere appreciation and gratitude to all the team members for powering the study and offering their in-depth expertise that has helped further enrich the study.

We sincerely hope that you find it a useful read. As always, we welcome all feedback at: [growth@publiciscommerce.com](mailto:growth@publiciscommerce.com)



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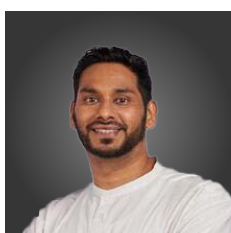
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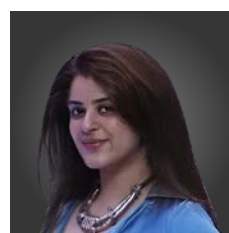
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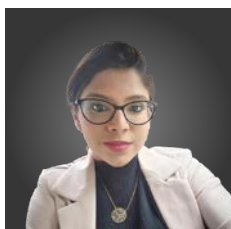
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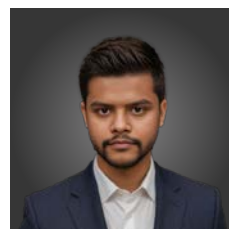
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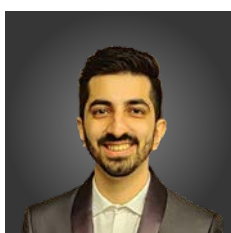
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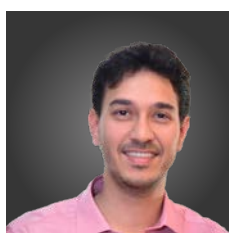
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## About MMA Global India

MMA Global India is part of MMA Global. Comprising over 800-member companies globally and 16 regional offices, MMA Global's mission is to advance marketers' ability to create value. We bring the world's leading CMOs together to shape the future of marketing, brands and businesses. By transforming marketers & marketing, we support them in unlocking greater impact from marketing by:

- Growing marketing's knowledge & capabilities
- Growing marketing's impact and importance
- Leveraging marketing to drive sales and profit

The MMA is the only marketing trade association that brings together the full ecosystem of marketers, martech and media companies working collaboratively to architect the future of marketing, while relentlessly delivering growth today. The MMA is committed to science and questioning and believes that creating marketing impact is steeped in constructively challenging the status quo encouraging business leaders to aggressively adopt proven, peer-driven and scientific best practices, without compromise. The MMA invests millions of dollars in rigorous research to enable marketers with unassailable truth and actionable tools.



## About Publicis Commerce India

Publicis Commerce India works with a range of clients across B2C, B2B and B2B2C businesses, delivering end-to-end Commerce solutions to activate the full potential of commerce & deliver on our clients' growth needs. It comprises of two major pillars - a) Foundation & Build, and b) Business & Growth. While Foundation & Build part works with organizations to lay the Commerce foundation and help them start their Commerce journey including

setting the right direction, establish the business and operating models, build the fit-for-purpose platform and support with Go-to-market approach. The Business & Growth part helps organizations growing their businesses on various commerce channels including e-Marketplaces and D2C, with services across Paid, earned & owned media, customer experience management, operations, tech enhancements, data analytics etc.

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