

E-commerce Market in India 2021

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Abstracts

In 2020, the e-commerce market was valued at INR 4,448.39 Bn. It is anticipated to reach a value of INR 10,585.27 Bn by 2026, expanding at a CAGR of ~18.29% during the 2021 – 2026 period. Affordable smartphones, increased internet penetration of the, and effective payment channels such as mobile wallets, and streamlined logistics infrastructure propel market growth. The Indian government leverages e-commerce platforms to transform and organize traditional offline businesses.

Market segment insights:

Based on product categories, the market can be segmented into online travel, retail, financial services, matrimony and classified, and other services.

In 2020, the online retail segment held the largest market share (~44.25%), followed by online travel (25.10%). Improved air and rail connectivity between tier I and tier II cities has increased domestic travel bookings, primarily through online platforms. However, in the wake of the pandemic, countries across the world were compelled to close their international borders. Domestic and international flights were canceled to curb the spread of the virus. Online travel aggregators reported zero business in the first quarter of FY 2021. After travel restrictions were eased and economic activities picked up pace, they focused on Focused on leisure tourism such as staycations and workations. This is expected to compensate for the losses in the travel business.

The online retail (e-tailing) segment was valued at INR 1,968.41 Bn in 2020 and is expected to reach INR 5,222.77 Bn by 2026. It is driven by the growth of internet-enabled devices, ease of shopping, innovative payment options, cashbacks, and discounts, as well as the rapidly evolving needs of customers.

COVID-19 impact assessment:

The pandemic and the subsequent lockdown have severely impacted the market. However, it is expected to bounce back, following an initial loss, since there are long-term growth opportunities in all its business segments. Since March 22, 2020, it has experienced disruption and incurred losses of more than INR 27.67 Bn in a week (March to April 2020). Demand and supply sides were affected due to halt in economic activities. Online shopping experienced a setback due to restrictions on physical movement and the shutdown of businesses, impacting the supply chain. About 8% of the modern retail trade could not function since the sale of non-essential goods was prohibited. Therefore, there was a steady decline in the sale of fast moving consumer goods (FMCGs).

The e-grocery segment developed rapidly in light of current events. The personal hygiene and care segment experienced steady growth in the first quarter of FY 2021. It accounts for ~4.5% of the total Gross merchandise volume (GMV) of the e-commerce platforms.

Competitive insights:

E-commerce companies have brought in various technologies such as voice recognition, virtual reality (VR), augmented reality (AR), fintech, artificial intelligence (AI), and machine learning (ML) to attract customers and compete with other players. Organizations such as Amazon, Flipkart, Goibibo, Ola, Zomato, and Ixigo have employed voice assistants for assisting customers with their queries, thereby improving customers' satisfaction. They also use fintech-based payment platforms such as PayPal, Apple Pay, Google Pay, and Amazon Pay to offer secure and efficient online payment methods to consumers.

Companies covered

Infibeam Avenues Ltd.

Info Edge (India) Ltd.

Thomas Cook (India) Ltd.

BigTree Entertainment Pvt. Ltd.

Flipkart Internet Pvt. Ltd.

Jasper Infotech Pvt. Ltd.

MakeMyTrip (India) Pvt. Ltd.

One97 Communications Ltd.

People Interactive (India) Pvt. Ltd.

Amazon India Ltd.

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