

E-COMMERCE AND LOGISTICS GROWTH IN INDIA

MEETING INDIA'S SEASONAL SURGE

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About BharatGAIN

BharatGAIN (Bharat Growth and Inclusion Network) is an independent think tank focused on overcoming barriers between policy creation and effective implementation across Indian industries. By connecting policymakers, industry leaders, and academia through rigorous research, evidence-based studies, and stakeholder engagements, we seek to combine best practices and behaviors to optimise the implementation of effective policies till the last mile. With a commitment towards achieving inclusivity and digital equity, BharatGAIN offerings are a value addition for stakeholders working on creating robust regulatory frameworks, digital infrastructure, capacity building, and stakeholder alignment. By filling overlooked policy gaps and fostering collaborations, we aim to effect decisions that enable a technology-led growth, universalising access as a public good.



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Executive Summary

The evolution of e-commerce and logistics during the festive season in India has witnessed remarkable growth and transformation, particularly between 2015 and 2020. This period has seen e-commerce revolutionise consumer behaviour and business practices, becoming more inclusive and accessible to a broader audience. The number of annual transacting users in the e-commerce industry has surged significantly over the past decade, marking a fifteen-fold increase. This growth reflects consumers' growing trust in online shopping, driven by improved services and seamless experiences. The integration of e-commerce into India's festive celebrations has been particularly noteworthy, with online platforms harnessing the festive spirit to offer special deals, discounts, and exclusive products, creating shopping frenzies that have redefined how Indians celebrate.

During the festive season, e-commerce experiences a 40-50% surge in sales, contributing substantially to annual earnings. The growth of e-commerce is marked by a nearly twenty-fold increase in the Gross Merchandise Value (GMV) from 2014 to 2023, underscoring the sector's rapid expansion and increasing economic importance. This growth has been facilitated by the critical link between e-commerce and logistics, which plays a pivotal role during festivals. The logistics industry has experienced remarkable growth, supporting the efficient processing and delivery of festive orders. However, during peak seasons, logistics firms must balance increased demand with operational efficiency, often requiring measures such as expanding their workforce, increasing their fleet size, and optimizing delivery routes.

The growth of the logistics sector is demonstrated by its increasing size, the emergence of numerous logistics startups, and its growing contribution to the country's GDP. This highlights the sector's increasing importance in the e-commerce landscape and the broader economy. Proper planning and execution are essential for the logistics industry to meet increased demand, prevent delivery delays, and ensure customer satisfaction during the festive season. While the logistics industry faces significant pressures during these peak periods, there is optimism for continued growth and success in both e-commerce and logistics.

Looking ahead, careful planning and strategic decisions can support the e-commerce sector and lead to advancements in logistics and supply chain management, ensuring smooth operations and improved customer satisfaction. The interplay between e-commerce and logistics represents a dynamic and evolving ecosystem that continues to reshape the way Indians celebrate and shop during festivals. This transformation extends beyond mere transactional changes, influencing cultural practices and consumer expectations. As both sectors continue to grow and adapt, they are likely to face new challenges and opportunities, from technological advancements to changing consumer preferences and regulatory landscapes.

The rapid growth of e-commerce and logistics in India, particularly during festive seasons, reflects a broader shift in the country's retail landscape. This evolution has not only changed how people shop but also how they engage with traditional festivals and celebrations. As these sectors continue to mature, they will likely play an increasingly important role in India's economic development and cultural practices, necessitating ongoing innovation and adaptation from businesses, consumers, and policymakers alike.

Objective

The proliferation of e-commerce in the past decade has had a profound and possibly irreversible impact on consumer behaviour, particularly around the festive season. The year 2024 marks a full decade since the first e-commerce festive season sale in 2014.

This report seeks to trace the impact of e-commerce growth in India on various interconnected sectors during the festive season, with a special focus on the logistics industry. Our analysis will delve into the influence of the festive season, a prime period for e-commerce activities, on the dynamics of the logistics sector and the subsequent growth within this domain.

Introduction

India's peak festive season, which arrives at the end of the calendar year, ushers in an era of joy, celebration, and of course, a surge in consumer purchases. The second half of the year marks a diverse tapestry of festivals—including Diwali, Dussehra, Eid-al-Fitr, Christmas, and so on—each guided by a different calendar, falling on a different day each year, with the largest and most widely celebrated festivals occurring in the short span of two months—October and November. For the logistics and supply chain industry, however, this time of the year is not about heralding the change in seasons and revelling in the festivities; rather, it is a time of immense pressures and challenges to ensure the seamless delivery of goods to hundreds of millions of customers and navigating the high-demand season with minimal hiccups.

Each year, the holiday season witnesses an increase in demand for consumer goods, both online and in-store, complemented by an increase in sales. E-commerce players typically witness a remarkable 40-50% surge in sales. Some businesses attribute a substantial portion of their annual profits to sales generated during just these two months.

The year 2024 marks a decade of fervent festive e-commerce in India.

Reflecting on the inception of Indian e-tail (B2C e-commerce) festive season sales in 2014, a profound transformation has become evident over these ten years. The annual GMV for the e-commerce industry has grown nearly twentyfold during this period.

In 2014, the industry's Gross Merchandise Value (GMV) stood at a modest ₹27,000 crore for the entire year¹. Compared to the 13% growth in e-commerce gross merchandise value (GMV) during last year's festive season (September-December 2023), e-commerce has the potential to grow at least 20% this year².

With such a massive uptick in order quantities, the available capacities of freight providers steadily dwindle, compelling logistics firms to engage in a delicate balancing act to secure capacities. The logistics industry requires careful planning and execution to ensure smooth operations and customer satisfaction.

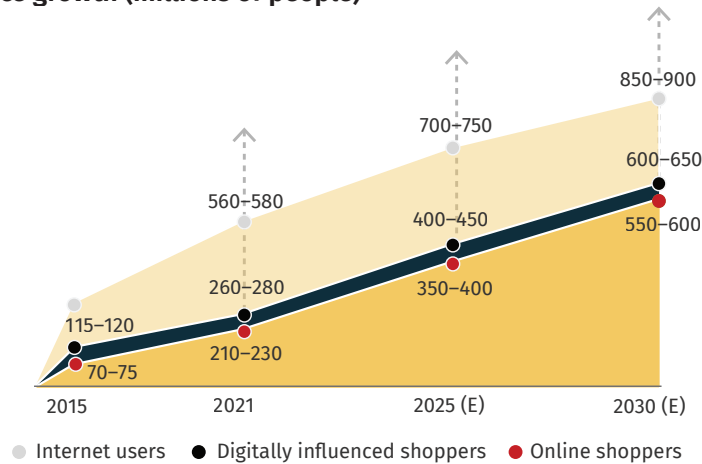
E-commerce growth in India

Digital commerce has witnessed a remarkable evolution in India, transforming consumer culture and reshaping the way we do business. Initially confined to upper-income households in major cities, e-commerce has expanded rapidly, particularly from 2015 to 2020. The proliferation of internet-enabled smartphones, affordable data, the inclusion of tier-2 and smaller cities, and the rapid expansion of middle-income households, have made e-retail inclusive and more accessible to a market that is yet to reach its full potential. The COVID-19 pandemic was a turning point, propelling India into a new phase of e-commerce growth. This post-2020 phase is marked by increased user penetration, enhanced digital engagement through social media, and a ceaseless focus on continually improving customer experience to cater to the diverse micro-segments emerging in the Indian market³.

Social Commerce

Social commerce refers to buying and selling products or services directly through social media platforms or social networking websites. In 2022, India witnessed a surge in social commerce shoppers, reaching 228 million.⁴ The market is projected to grow tenfold, reaching USD 55 billion by 2030, driven by a surge in digital shopping. This new business channel is gaining traction, particularly in Tier 2 and Tier 3 cities, where small-scale brands can thrive by offering affordable products, especially in the fashion and home improvement sectors. Brands are leveraging a mix of influencer marketing, paid partnerships, visually appealing content, and giveaways to drive sales and increase visibility.⁵

Internet and e-commerce growth (millions of people)



Source: BCG

The data reveals a steady expansion in India's internet use, digital engagement, and online shopping segments. It showcases an increase in online shoppers from approximately 70 million in 2015 to approximately 210 million in 2021, with a projected surge to 550 million by 2030.⁶ This trend indicates the growing influence of digitalisation on consumer behaviour, with an increasing number of people turning to online platforms for their shopping needs. Moreover, the burgeoning role of social media platforms in facilitating online shopping highlights the rising significance of social commerce.

3 Arpan Sheth, Shyam Unnikrishnan, Manan Bhasin, and Abhishek Raj, Bain & Company, 2022. Available at <https://www.bain.com/insights/how-india-shops-online-2022-report/>

4 EY Commerce and Consumer Internet Sector Report, Ernst and Young, February 2023. Available at https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2023/02/ey-commerce-and-consumer-internet-sector.pdf?download

5 'Social commerce set for growth, concern of authenticity looms large', Business Standard, April 2024. Available at https://www.business-standard.com/industry/news/social-commerce-set-for-growth-concern-of-authenticity-looms-large-124040700339_1.html

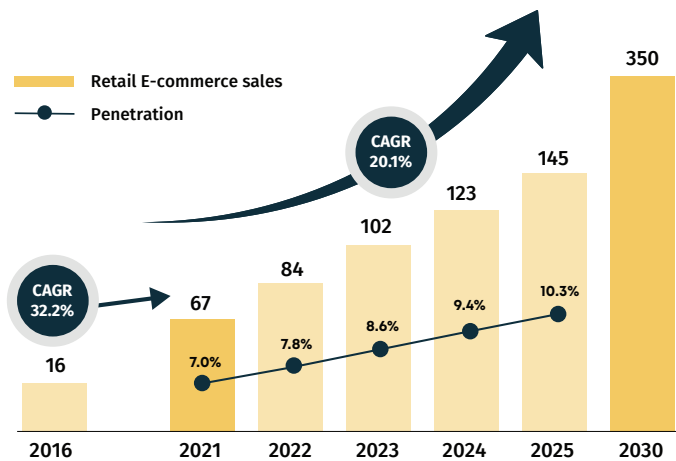
6 Nimisha Jain, Kanika Sanghi, and Nivedita Balaji, Boston Consulting Group, June 2022. Available at <https://web-assets.bcg.com/09/9e/3cf5c702473fa0c5bb1008c7498e/bcg-ten-things-you-should-know-about-e-commerce-in-india-jun-2022.pdf>

To that end, logistics has played a crucial role in the growth of e-commerce across India. With seamless and timely delivery and return policies offered by most e-commerce entities, it has improved customer experience and established trust in online purchases, thereby contributing to the acceleration of the e-commerce sector. Going forward, this synergy between logistics and e-commerce will be a key driver in shaping the future trends of online retail, further underlining their interdependence.

Digitisation

India's digital consumer economy is heading for an incredible milestone, with an expected value of US\$1 trillion by 2030. This growth is driven by the rapid shift to digital and a surge in investments. In global rankings, India is at the top for digital payments, second for internet users, and third for online shoppers. Plus, it's the second-highest destination for worldwide investments in digital shopping, with a whopping US\$22 billion poured in during 2021.⁷

India e-commerce market size and penetration



Source: EY

After experiencing a remarkable growth spurt of more than 33% over the last five years (from 2016 to 2021), the Indian e-commerce industry has now entered a new phase. This phase is all about shifting gears and concentrating on creating sustainable business models. Starting from 2021, we've observed a deceleration in growth, but that doesn't mean the story is over. The Indian e-commerce market is expected to continue its journey, with projections indicating it could reach a staggering 350 million by the year 2030.⁸ So, while the pace might be changing, the e-commerce tale in India is far from finished.

Consumption trends during festivities

Festivals are at the heart of Indian culture and tradition, and they've seamlessly woven online shopping into the fabric of celebration. Over the years, e-commerce platforms have leveraged these occasions to offer special deals, discounts, and exclusive products, creating a shopping frenzy during festivals. E-commerce companies, in turn, have capitalised on these celebrations by tailoring their marketing strategies and product offerings to cater to the unique demands of each festival, creating a win-win situation for both consumers and businesses. This synergy between festivals and e-commerce offerings has not only redefined the way Indians celebrate but also underlined the adaptability and vibrancy of the e-commerce ecosystem in India.

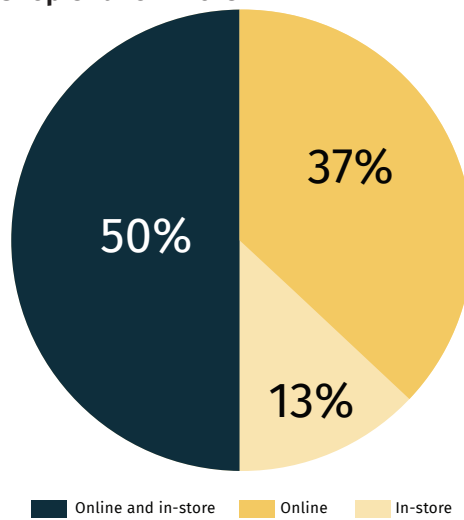
⁷ EY Commerce and Consumer Internet Sector Report, Ernst and Young, February 2023. Available at https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2023/02/ey-commerce-and-consumer-internet-sector.pdf?download

⁸ EY Commerce and Consumer Internet Sector Report, Ernst and Young, February 2023. Available at https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2023/02/ey-commerce-and-consumer-internet-sector.pdf?download

What is the 'festive month'?

The festive season for e-commerce in India gains momentum in September with the onset of Onam and Navratri, followed by Durga Puja and Dussehra, and eventually reaches its zenith with Diwali in October or November. These months are marked by a surge in online shopping, as consumers eagerly seize the opportunity to explore special discounts and deals.

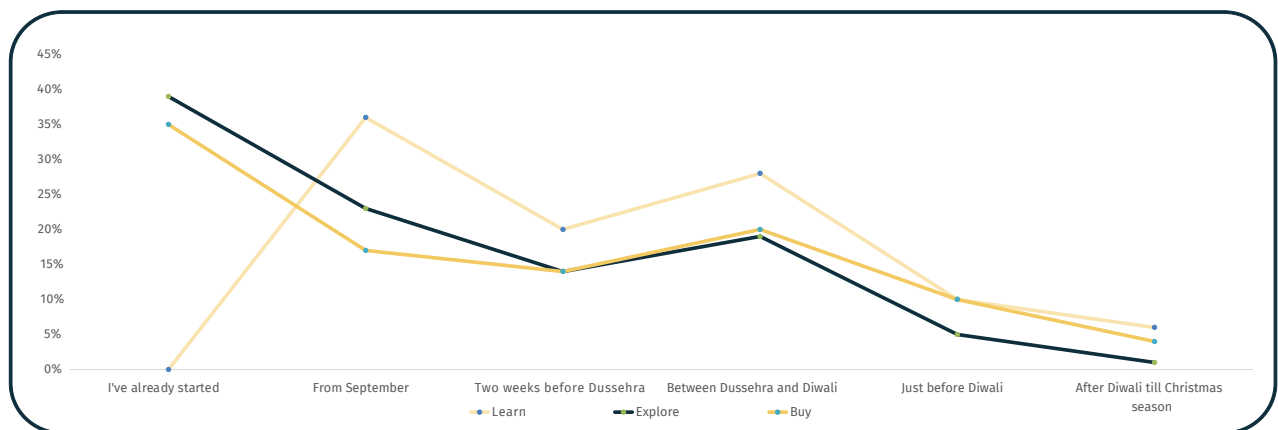
Percentage of People Planning to Shop Online in 2023



Source: InMobi

People are changing the way they shop during festive seasons. Instead of relying solely on physical stores, more and more people are favouring a mix of online and in-store shopping. This change in perception reflects a growing preference for the convenience, variety, and accessibility that online shopping offers, especially during festive seasons.⁹

Shopping peaks across the festive months

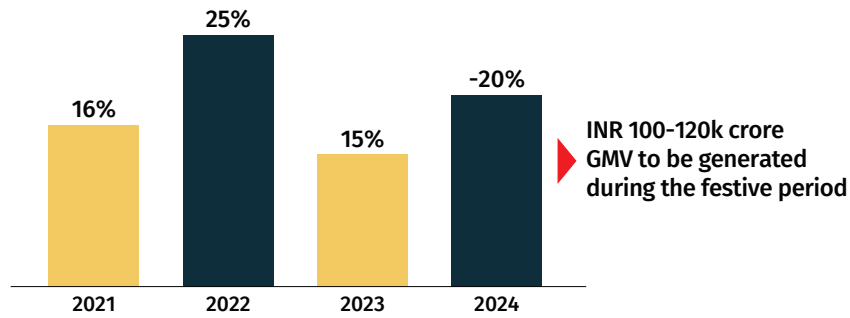


Q. When do you expect to start planning your festival season shopping for this year? | Sample size: 187
 Q. When will you shortlist brands for the categories you plan to buy? | Sample size: 605
 Q. When will you buy the particular brand/product? | Sample size: 168

Source: InMobi, Glance

The survey findings reveal that the shopping fervour doesn't merely coincide with the onset of festivities; it commences well in advance, gaining substantial momentum around Dussehra and Diwali—indicative of a parallel trend of consumer planning. While this planning commences as early as September, the months of festive fervour witness a substantial uptick in shopping engagements.¹⁰ The evolution of 'Diwali hampers' mirrors this trend, with an increasing emphasis on healthier choices, with products such as makhana (foxnut) snacks, baked nibbles, and nutrient-rich millet laddoos gaining popularity.

Change in GMV during Festive Season



Source: Redseer Consulting

Festive season sales are like rocket fuel for India's e-commerce party! They're the times when online shopping goes into overdrive, and everyone's scrambling to grab the best deals.

Back in 2014, India started its first 'eTailing' festive season sales, and this year marks the 11th anniversary of these festive offers, heralding a new tradition for the tech-savvy Indian consumer. During this month-long celebration, there's been a noticeable increase in the value of products sold, which is referred to as Gross Merchandise Value (GMV). Projections for 2024 indicate that the GMV for the entire festive month in India is expected to reach an impressive figure of INR 100-120 thousand crore, showcasing a substantial 18-20% expansion compared to the previous year's festive month sales.

This surge can be attributed to several key factors that have significantly influenced consumer behavior. There is a notable pent-up demand, particularly in categories such as mobiles and electronics during festive periods. At the same time, brands are increasingly focusing on premiumisation by offering luxury products at discounted prices to encourage aspirational buying. Sales in the premium segment (priced above Rs 30,000) grew by 7% year-on-year, and the ultra-premium segment (priced above Rs 45,000) saw an even more impressive growth of 12% year-on-year, driven largely by the demand for Apple and Samsung devices. Research indicates that Apple's iPhone 15 and iPhone 13 were the top-performing premium smartphones on Flipkart and Amazon at the beginning of the 2024 sale.¹¹ During this time, e-commerce platforms also launched new selections and ranges, particularly in popular categories like fashion, creating excitement among consumers.

This case study highlights the strategic efforts of Flipkart, a prominent e-commerce giant, in empowering small businesses and diversifying its customer base through two distinctive initiatives, Shopsy and Samarth. These initiatives have not only expanded Flipkart's reach but have also had a significant impact on small businesses and underserved communities.¹²

10 "The Marketers Guide to the Festive Season 2023," InMobi and Glance, 2023. Available at https://go.inmobi.net/hubfs/IND_2023_Festive-Report/The%20Marketers%20Guide%20to%20the%20Festive%20Season%202023_InMobi%20and%20Glance.pdf?utm_campaign=IND_2023_FestiveReport&utm_medium=email&_hsmt=272301998&_hsenc=p2ANqtz-8H7WdTR-aulITWwSjWcMTI7d0MjKDoVfVYPot8shdbUMkHQSB3QhVUlKqegBvRA6DvS8ng65cmvQ-rqs5n6H6qrk3eQ&utm_content=272301998&utm_source=hs_automation

11 Apple and Samsung drive India's smartphone festive sales value to over \$3.2 bn in first wave: Counterpoint. October 2024. Available at <https://telecom.economicstimes.indiatimes.com/news/devices/apple-and-samsung-drive-indias-smartphone-festive-sales-value-to-over-3-2-bn-in-first-wave-counterpoint/114110751>

12 Kunal Bhatnagar, "Festive 2024 Insights: Redseer projects 20% YoY E-Commerce Growth," September 2024. Available at <https://redseer.com/reports/festive-2024-insights-redseer-projects-20-yoy-e-commerce-growth/>

Case Study: Samarth - Empowering Small Businesses and Diverse Entrepreneurs

Flipkart's Samarth initiative is a dedicated endeavour that underscores the company's commitment to supporting and nurturing small businesses while promoting diversity on its e-commerce platform.

This initiative focuses on assisting artisans and craftsmen, particularly those from rural areas. Samarth provides a platform for these individuals to list and sell their products online, preserving traditional crafts and, at the same time, enhancing livelihoods. By leveraging the reach of Flipkart, Samarth ensures that these artisans gain access to a broader customer base and benefit from the digital economy.

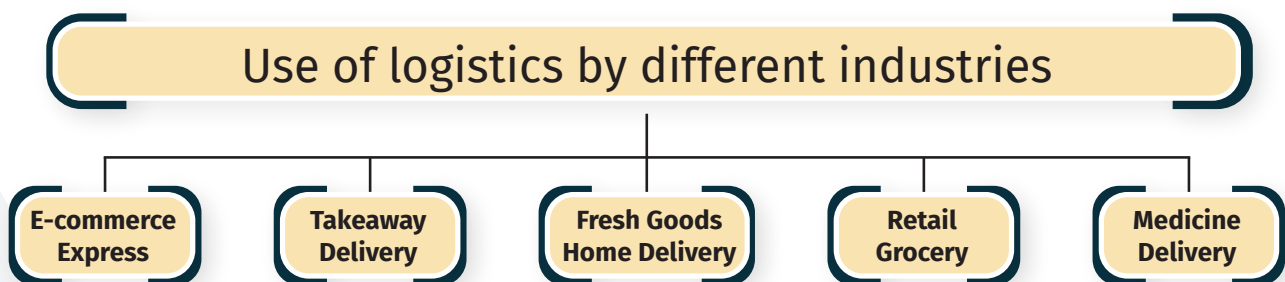
Correlation between E-commerce growth and logistics growth

The Indian e-commerce sector has evolved into a significant indicator of consumer demand in the country. As India's cities become more cosmopolitan, local festivals have taken on a broader appeal, promoting cultural integration and creating sales opportunities in larger markets. The extended festive season triggers intense competition between traditional brick-and-mortar stores and their online counterparts as they vie for a piece of the sales pie. However, the real challenge lies in efficiently managing human resources and enhancing last-mile delivery capabilities.

The rapid growth of e-commerce as we have discussed has had a ripple effect on various periphery industries, especially infrastructure and logistics. Online retailers are increasingly outsourcing their logistics operations to ensure accurate and timely order fulfilment. Today's consumers not only expect quick deliveries but also hassle-free return processes. E-commerce relies on a seamless supply chain, and logistics play a critical role in facilitating these efficient operations.

Logistics delivery services serve various needs, with a significant focus on e-commerce deliveries. Additionally, there are services catering to takeaway delivery, fresh goods home delivery, retail grocery, and medicine delivery, reflecting the diversity of demands in the market. These services collectively play a pivotal role in ensuring the smooth flow of goods and services during the festive season and beyond, contributing to the growth of India's e-commerce industry.

Industry scenarios for logistics delivery services depict that logistics services are most widely used for e-commerce deliveries.



Delivery models for Logistics Services

1. To-door Delivery (Mainstream)

Couriers deliver parcels to final customers directly to their homes by driving in specific areas uniformly and notifying customers to pick them up by phone call / SMS / APP.

2. OOH (Out-of-Home) delivery mode (Uptrend)

Customers pick up parcels by themselves, mainly through PickUp or DropOff (PUDOs), and locker banks. PUDO is a service location where one can collect or deposit a parcel, e.g., a convenience store, a parcel shop, a post office, or a retail store, etc. Locker banks are automated mailbox machines.¹³

There are two primary driving factors as to why we are required to work on improving the logistics industry. Firstly, the contradiction between supply and demand is becoming increasingly serious. Along with ageing, the increasing labour cost and the high mobility of couriers make employment more difficult. Under the background of the growing e-commerce demand and parcel volume, a more efficient way is needed for last-mile delivery. Secondly, the diversity of consumer demand is increasing, necessitating a change in approach to deliveries. In addition to the requirements for convenience and flexibility of parcel pick-up, consumers are also considering solution diversity, environmental protection, and sustainable development.

Stakeholders

Stakeholders involved in a delivery process



¹³ "Global Smart Last Mile Logistics Outlook". Deloitte. 2023. Available at <https://www2.deloitte.com/content/dam/Deloitte/cn/Documents/consulting/deloitte-cn-consulting-2023-global-smart-last-mile-logistics-outlook.pdf>

<ul style="list-style-type: none"> ● Customers ● E-commerce platforms (e.g., Amazon, Flipkart) ● Sellers (individuals or businesses) ● Warehousing and Fulfilment Centres ● Delivery and logistics companies (e.g., Delhivery, Ekart, Ecom Express) ● Payment gateways (e.g., Paytm, Razorpay) ● Customer service providers 	<ul style="list-style-type: none"> ● Manufacturers and suppliers ● Digital marketing agencies ● Government authorities and regulators ● Trade associations ● Environmental Agencies like pollution control boards ● Delivery Personnel (Labour)
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Hyperlocal E-commerce

The Rise of the Hyperlocal E-Commerce

Hyperlocal e-commerce has rapidly emerged as a transformative force in digital commerce, fundamentally reshaping consumer expectations. Today's shoppers, no longer satisfied with standard delivery times, demand ultra-fast service, expecting products to arrive within hours or even minutes. This shift has prompted businesses to overhaul their logistics models, focusing on localised delivery within small geographic zones to ensure unprecedented speed. In this way, hyperlocal e-commerce has redefined convenience, catering to the growing desire for instant access to goods and services.

By 2022, the hyperlocal e-commerce sector boasted over 214 million active shoppers, with the market projected to grow to \$5.5 billion by 2025.¹⁴ Originally centred around quick grocery deliveries, the model has since expanded to encompass a wide array of products, including medicines, electronics, and beauty items. This movement towards ultra-fast delivery, often referred to as Q-commerce (Quick Commerce), has revolutionised traditional e-commerce logistics. Unlike older models that focus on optimising supply chains for scheduled deliveries, Q-commerce prioritises speed and efficiency by leveraging cutting-edge technologies and hyperlocal infrastructure.

The Infrastructure of Hyperlocal E-commerce

At the heart of hyperlocal e-commerce lies the necessity for a flexible, localised supply chain capable of delivering products swiftly. Proximity is a critical factor; both the order source and the customer must be geographically close. To meet this requirement, businesses have adopted innovative approaches, such as utilising micro-warehousing facilities or partnering with local retail stores instead of depending on large, centralised warehouses.¹⁵ This decentralised distribution network of compact hubs manages everything from inventory storage to order processing and last-mile delivery, enabling businesses to fulfil orders quickly while minimising the costs associated with traditional warehousing and long-distance transportation.

¹⁴ "India's 10-15 minute delivery market to reach \$5.5 billion in 3 yrs: Report". Business Standard. 2022. Available at https://www.business-standard.com/article/markets/india-s-10-15-minute-delivery-market-to-reach-5-5-billion-in-3-yrs-report-122030300382_1.html

¹⁵ "Hyperlocal delivery revolution: How shopping trends are changing the logistics industry?". Economic Times. 2023. Available at <https://economictimes.indiatimes.com/small-biz/sme-sector/hyperlocal-delivery-revolution-how-shopping-trends-are-changing-the-logistics-industry/articleshow/99861744.cms>

The Last Mile and Technology

The final mile of the delivery process is crucial to the success of hyperlocal e-commerce. To maintain speed, businesses employ small delivery fleets or gig workers operating within compact geographic zones. This localised approach significantly reduces the time it takes for products to move from micro-warehouses to customers' doorsteps.

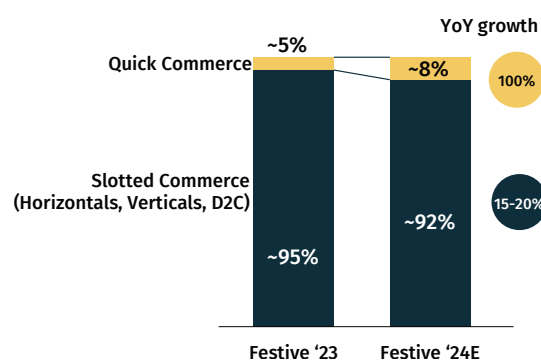
Technology plays a pivotal role in optimising the hyperlocal e-commerce model. Advanced systems powered by data analytics and machine learning provide businesses with valuable insights into demand patterns, stock levels, and order volumes. This enables retailers to allocate inventory efficiently and mitigate the risk of stockouts. By gaining a deeper understanding of local consumer preferences, businesses can fine-tune their offerings to ensure that the right products are consistently available, further enhancing the speed and convenience that define hyperlocal e-commerce.

Challenges and Considerations

However, while Q-commerce offers numerous benefits, it does present unique challenges and considerations for retailers and logistics providers. Establishing and maintaining the infrastructure required for Q-commerce operations can be capital-intensive, requiring significant investments to support the scalability and reliability of logistics networks. Managing the intricacies of Q-commerce logistics—such as dynamic demand fluctuations, rapid order turnover, and tight delivery timelines—requires robust operational capabilities and technical expertise. Retailers must streamline processes, leverage automation, and implement agile supply chain practices to navigate these complexities effectively.

Additionally, meeting the heightened expectations of Q-commerce customers poses a continuous challenge for retailers, as ensuring on-time delivery and providing seamless order tracking and communication are crucial for maintaining customer satisfaction and loyalty. Despite these advancements, quick commerce companies often struggle with managing stock-keeping units, leading them to focus on top-selling products rather than offering the extensive selection found on larger e-commerce platforms. Their relatively nascent operations can also limit their market reach.¹⁶

Quick Commerce Takes Off During Festive Season



Source: Redseer

Quick commerce startups are gearing up to seize the high-spending festive season, expecting substantial growth. Many platforms have already seen record sales during major events like the Cricket World Cup Final, New Year's Eve, Valentine's Day, and Raksha Bandhan. With projections pointing to nearly 100% year-on-year growth during the festive period, the sector is poised for a significant boom.

¹⁶ "Role of quick commerce in e-commerce logistics". TVS Supply Chain Solutions. 2024 Available at <https://www.tvsscs.com/role-of-quick-commerce-in-e-commerce-logistics/>

While groceries remain the backbone of quick commerce, other categories—such as home decor, gifting, pooja essentials, beauty, and personal care—are gaining momentum, especially during festive occasions. Companies are tailoring their offerings to align with seasonal demand. For instance, during Dhanteras, platforms strategically promoted gold and silver coins, tapping into the tradition of purchasing these metals on an auspicious day.

This surge in demand could see quick commerce platforms capturing around 8% of the overall festive gross merchandise value (GMV).¹⁷ To meet this growing demand, companies are expanding their product ranges to include higher-ticket items and are opening new dark stores to extend their operational reach. Logistics providers are also enhancing their infrastructure with scalable warehousing solutions designed for quick commerce, enabling faster turnaround times and seamless connections between urban and non-urban areas.

Increased Competition and Hiring

As established players like Zepto, Blinkit, and Swiggy Instamart strengthen their positions, they are¹⁸ also facing increased competition from new entrants like Flipkart Minutes, JioMart, and BigBasket, all of which are introducing rapid delivery services to capture a slice of the market.

As demand surges, companies like Blinkit and Zepto are ramping up their hiring efforts by 50-60%, with expectations that this trend will continue beyond Diwali. Delivery partners stand to earn between ₹24,000 and ₹28,000 per week, with festive season incentives boosting their earnings by an additional 20-30%. To further attract talent, these companies are offering bonuses for attendance, referrals, and successful first-attempt deliveries.

Expansion in Tier II and Tier III Cities

There is also significant growth in smaller cities, with Meesho reporting that 60% of its seasonal hiring is taking place in Tier III regions. Meanwhile, Zepto, Blinkit, and Swiggy Instamart are actively expanding their operations in Tier II markets, signalling a strategic move to tap into the evolving consumer landscape and meet the increasing demand for quick commerce services.¹⁹

Limitations of Quick Commerce

Despite these advancements, quick commerce companies face challenges in managing stock-keeping units. As a result, they tend to focus on top-selling products rather than offering the extensive selection found on larger e-commerce platforms. Additionally, their relatively nascent operations limit their market reach.

Reach of Major Quick Commerce Players in Indian Cities



Source: Company Websites & Media Reports

¹⁷ Kunal Bhatnagar, "Festive 2024 Insights: Redseer projects 20% YoY E-Commerce Growth," September 2024. Available at <https://redseer.com/reports/festive-2024-insights-redseer-projects-20-yoy-e-commerce-growth/>

¹⁸ "Festive Season Showdown: Can Quick Commerce Dethrone Ecommerce?" Inc42. 2024. Available at <https://inc42.com/features/festive-season-showdown-can-quick-commerce-dethrone-ecommerce/>

¹⁹ "Festive orders, faster delivery: Ecommerce, logistics players double down on hiring to manage surge". Yourstory. 2024. Available at <https://yourstory.com/2024/09/festive-orders-faster-delivery-ecommerce-logistics>

Case Study: Quick Commerce Takes Center Stage

During Rakshabandhan, quick commerce platforms capitalised on the rising consumer preference for speedy, hassle-free deliveries, eclipsing traditional shopping methods and solidifying their significance in the Indian retail landscape.

- Blinkit, commanding a formidable 40% market share, recorded an astonishing sale of approximately 700 rakhis per minute. The platform achieved unprecedented milestones in orders per minute (OPM), gross merchandise value (GMV), and chocolate sales, showcasing its strength during the festive season.
- Zepto also experienced remarkable success, launching its innovative 'Lifafas' (decorative envelopes) and surpassing 1 million orders. This creative offering attracted consumers seeking convenient gifting solutions, further enhancing Zepto's festive appeal.
- Swiggy Instamart reported an extraordinary 646% surge in perfume sales, along with a doubling of its rakhi sales compared to the previous year. This impressive growth underscores the platform's ability to adapt and cater to changing consumer demands during the festive period.
- All in all, the success of these quick commerce platforms during Rakshabandhan highlights their growing role in our festive shopping habits. As we continue to look for speed and convenience in our purchases, it's exciting to see how these platforms are changing the game!²⁰

The Future of Quick Commerce

Looking ahead, the quick commerce industry is poised for further transformation. Innovations in AI and machine learning will continue to optimise supply chain operations i.e. with micro-warehouses and hyperlocal logistics, making them more efficient and responsive to real-time demand fluctuations. Moreover, the integration of drones and autonomous delivery vehicles could revolutionise last-mile delivery, making it faster and more sustainable.

However, the sector's astronomical growth is also attracting a fair share of criticism from FMCG distributors associations, which have raised concerns with the Ministry of Commerce and Industry. They allege that the 'unchecked expansion' of quick commerce platforms like Blinkit, Zepto, etc., could severely impact and disrupt the distribution networks of FMCG players, operations of traditional retailers, and the retail ecosystem at large.²¹ Similarly, critics also argue that the expansion of quick commerce to smaller towns could heighten the logistical complexities even further, suggesting that it could increase operational costs and destabilise the working conditions and the ecosystem for gig workers. Furthermore, questions are also being raised about its long-term sustainability, and feasibility of charging high premiums as convenience fees in smaller towns, given the risks involved in quick commerce players' reliance on continuous external funding.²²

While concerns remain about the sustainability and robustness of aspects of hyperlocal e-commerce, the current trajectory points to several disruptions, be it through quick commerce's competition with e-commerce giants during festive season sales, or disruption of the fashion & apparel, and electronics segments. While quick commerce in the clothing segment continues to face critical challenges like high return rates to the tune of 25-30%, the focus for these platforms will be to broaden their product ranges, identifying concerns over quality and order inaccuracies, along with expansion plans in newer segments.²³

20 "Quick commerce platforms hit record sales during Rakshabandhan celebrations" Business Standard. 2024. Available at https://www.business-standard.com/industry/news/quick-commerce-platforms-hit-record-sales-during-rakshabandhan-celebrations-124081901054_1.html

21 "Quick commerce's growth disrupting retail, say FMCG distributors" Business Standard. 2023. Available at https://www.business-standard.com/companies/news/fmcg-distributors-urge-govt-to-address-quick-commerce-impact-on-retail-124082300992_1.html

22 "The future of quick commerce in India: A race against time or a race to nowhere?" Business Today. 2024. Available at <https://www.businesstoday.in/opinion/columns/story/the-future-of-quick-commerce-in-india-a-race-against-time-or-a-race-to-nowhere-451232-2024-10-23>

23 "How Brands Are Leveraging Quick Commerce in the Festive Season ?" UPS House. 2024. Available at <https://www.linkedin.com/pulse/how-brands-leveraging-quick-commerce-festive-season-usphouse-hxcgc/>

Quick commerce's stiff competition with traditional e-commerce retailers, is likely to be confined to urban centres and Tier 1 cities for now, despite the expansion of dark store networks into Tier 2 & 3 towns by players like Zepto, Blinkit, and Swiggy, ahead of the festive season. Nevertheless, in preparation for its upcoming Big Billion Days 2024 sale in October, Flipkart has attempted to expand its quick delivery capabilities by opening around 100 dark stores in major cities. Moreover, it launched the 'Flipkart Minutes' initiative, with a focus on enabling ultra-fast deliveries, particularly in highly-demanded categories, to further boost its competitive edge against quick commerce players in the festive season.²⁴ This indicates the level of competition quick commerce players will face in the future, with traditional e-commerce players strategising to safeguard their market dominance, despite the relatively smaller inroads made by quick commerce businesses.

Some industry experts argue that consumer behaviour vis-a-vis festive season shopping remains non-impulsive and that the trust factor, planning, pricing, and brand legacy are important metrics for shoppers. Data released by market intelligence firm Datum Intelligence, suggests how quick commerce players have some distance to cover when it comes to competition with e-commerce giants in festive season sales.²⁵ For instance, their September 2024 data suggests that online shoppers are expected to spend approximately ₹100,000 Crore throughout the festive season in 2024, with around 8% share of the sales captured by quick commerce platforms.²⁶ Estimates suggest that quick commerce players will contribute only around \$1 billion in GMV to the total estimated GMV of \$12 billion during the festive season sales. While they play catch-up and continue impacting traditional e-commerce marketplaces across the majority of grocery categories, some beauty and personal care verticals in India's megacities, smaller towns and mid-sized cities have seen less of an impact. Furthermore, online shoppers of electronics and appliances like laptops, mobiles, and washing machines will continue witnessing the domination of marketplaces like Amazon and Flipkart, while quick commerce is expected to see an upsurge in online grocery sales during the festive season, increasing from 40% outside the festive season to 51% during the festive season.²⁷

Gig Work and E-Commerce

Bridging the Skill Gap

An increase in demand for services begets a parallel increase in supply and creation of more jobs—a lesson in basic economics that is reinforced by the swell of the gig economy during India's festive season. This year, according to reported surveys, the seasonal demand for gig work in general is expected to rise by about 20%, with an estimated 10 lakh gig hires will be engaged to keep up with the rising demand.²⁸ Within the gig economy, e-commerce takes the lion's share with a 35% increase, followed by logistics (15%), retail (14%) and hyperlocal commerce (11%). Interestingly, the demand surge appears to be higher in Tier 2 and 3 cities such as Bhopal, Bhubaneswar, Chandigarh, Coimbatore, Jaipur, Madurai, Nagpur, and Vizag—with a 22-25% increase in gig hires, while the metros continue to see an increase of about 18-20% across the board.

Gig work in e-commerce would typically cover delivery services, warehouse staff, inventory managers, kirana store partners, and logistics coordinators. App-based platforms that provide online transport and delivery

24 "E-commerce firms focusing on quick deliveries this festival season" Business Standard. 2024. Available at https://www.business-standard.com/industry/news/e-commerce-firms-focusing-on-quick-deliveries-this-festival-season-124081100274_1.html

25 "Will Quick Commerce Eat Amazon, Flipkart's Festive Season Lunch?" Inc 42. 2024. Available at <https://inc42.com/features/will-quick-commerce-eat-amazon-flipkarts-festive-season-lunch/>

26 "Festive Season Will Generate ~₹100,000 Crore In Online Sales" Datum Newsletter. 2024. Available at <https://www.datumintell.in/2024-indian-festive-season-sales-a-record-breaking-year-ahead/>

27 Ibid 24.

28 Debleena Majumdar, 'Gig hiring for the festive season heats up, but there's a need for better domain and soft skills', published in the Economic Times on 8 October 2024, available at <https://economictimes.indiatimes.com/jobs/hr-policies-trends/gig-hiring-for-the-festive-season-heats-up-but-theres-a-need-for-better-domain-and-soft-skills/articleshow/114047312.cms?from=mdr>. See also Business Standard, 'Gig hiring to soar by 20% in festive season, e-commerce may lead: Indeed,' published 5 September 2024, available at https://www.business-standard.com/industry/news/gig-hiring-to-soar-by-20-in-festive-season-e-commerce-may-lead-indeed-124090500710_1.html

services figure prominently as recruiters for gig work. According to a report by TeamLease Edtech²⁹ (which surveyed 837 employers across multiple sectors), over 60 percent of employers highlighted technical and communication skills as key hiring criteria for gig workers. A significant majority of employers (71.43%) reported that gig workers meet their expectations.

While gig workers in India are generally seen to be tech-savvy, nearly half of the surveyed employers observed that workers lack knowledge about the industry in which they are hired. An overwhelming majority of employers (86.9%) highlighted the significance of client management as an important or very important skill that they seek in gig workers. While about 64% of employers found gig workers' client management skills to be adequate, over a quarter of employers surveyed reported a lack of soft skills among gig workers, such as teamwork, effective communication, and a problem-solving attitude. As a result, employers generally prefer gig workers with 1-5 years of work experience for hire, with only about 10% of employers indicating their willingness to hire workers without prior experience. Interestingly, this far exceeds the percentage of employers that prefer to hire experienced workers with 5-10 years' experience (16.67%) or over 10 years of experience (4.76%), indicating a preference for a mixed skillset i.e., a blend of fresh perspectives with practical experience.

To meet the demand that accompanies the seasonal surge, it would therefore be vital for employers to conduct intensive annual training programmes for prospective gig workers, prior to induction in the workforce and to improve their prospects for future gigs once the seasonal demand recedes. The training would have to include a variety of workshops and seminars on improving soft skills, but would also have to include comprehensive seminars about the industry in which the employer operates, with due focus being accorded to the business objectives of the employer, the state of the industry, and a comprehensive incentive structure that is designed to benefit model service providers.

Role of Logistics

Growth in Logistics

Over the past decade, the Indian logistics industry has witnessed remarkable growth, with its market share increasing from USD 288 billion to a projected USD 380 billion by 2025³⁰ and an anticipated USD 484 billion by 2030. This consistent upward trajectory, marked by a healthy annual growth rate of 10-12%, has made a substantial contribution of 14.4% to the country's GDP.³¹



²⁹ TeamLease Edtech, "Gig Economy Skills: Equipping Youth for Freelance and Flexible Work," published 19 July 2024, available at <https://www.teamleaseedtech.com/uploads/Gig-Economy-Skills-Equipping-Youth-for-Freelance-and-Flexible-Work.pdf>

³⁰ "India Freight Logistics Market - Growth, Trends, COVID-19 Impact, and Forecasts (2022 - 2027)," Mordor Intelligence. Available at <https://www.mordorintelligence.com/industry-reports/india-freight-logistics-market>

³¹ "Warehousing and Logistics Sector in India," India Brand Equity Foundation (IBEF), May 2023 Available at <https://www.ibef.org/blogs/warehousing-and-logistics-sector-in-india>

This sector has transitioned into a central player, serving as the backbone of every segment of the economy. It has evolved far beyond its origins in mere transportation and storage, maturing into a specialised field that encompasses a comprehensive range of services like end-to-end product planning, value-added last-mile delivery services, and predictive planning through analytics.

The Impact of National Logistics Policy and Gatishakti

The pivotal game-changer in this evolution has been the introduction of the National Logistics Policy and Gatishakti, two synergistic and comprehensive initiatives aimed at enhancing the logistics ecosystem. The National Logistics Policy, in particular, is driven by the objective of establishing a comprehensive, cross-sectoral policy framework for the logistics industry. Its core goals are to enhance efficiency, reduce logistics costs by 5% of GDP within the next five years, and foster the development and integration of global and regional supply chains.³²

The Pandemic's Effect and E-commerce Surge

The pandemic, while imposing significant restrictions on the movement of goods across the country, had a detrimental effect on the logistics sector by slowing its growth and exposing critical supply chain vulnerabilities. However, amidst these challenges, there was a silver lining in the form of a surge in e-commerce shopping, which directly bolstered the logistics industry. The increased demand for online shopping led to higher shipping volumes, necessitating an uptick in logistical support. Notably, e-commerce's heavy reliance on last-mile delivery played a pivotal role in propelling the development of the logistics sector.

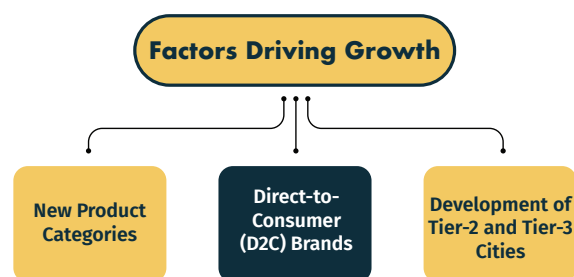
The Growth of E-commerce Logistics

The Indian E-commerce logistics market was valued at USD 2.9 billion in 2019 and is expected to grow to USD 10.1 billion by 2027.³³ E-commerce has driven the industry's growth, particularly during the festive season, when consumer spending on gifts skyrockets. This surge in e-commerce sales benefits e-commerce companies while significantly boosting logistics firms, creating a mutually beneficial partnership.

Number of Shipments

Packages Handled in FY23: Over 4 billion

Projected Packages by FY28: 10 billion



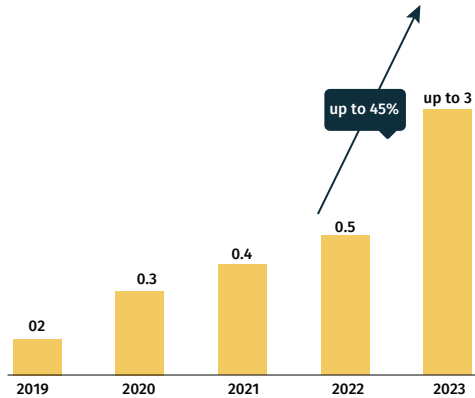
Source: Hindu Businessline

³² Kunal Sood, Tejinder Gupta. "Evolving landscape of warehousing and logistics in India: A road to becoming third-largest economy by 2027" Grant Thornton. July 2023. Available at https://www.grantthornton.in/globalassets/1.-member-firms/india/assets/pdfs/evolving_landscape_of_warehousing_and_logistics_in_india.pdf

³³ EY Commerce and Consumer Internet Sector Report, Ernst and Young, February 2023. Available at https://assets.ey.com/content/dam/ey-sites/ey-com/en_in/news/2023/02/ey-commerce-and-consumer-internet-sector.pdf?download

The e-commerce logistics market in India, having handled over 4 billion packages in FY23, is poised for further expansion, with projections indicating it could reach 10 billion parcels by FY28. This growth is primarily attributed to the emergence of new product categories, the presence of direct-to-consumer (D2C) brands, and the continued development of tier-2 and tier-3 cities.³⁴

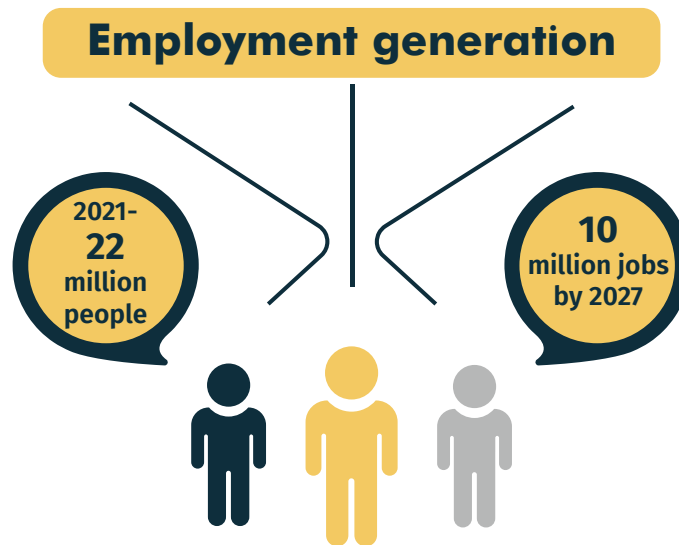
Logistics shipments due to D2C



Source: Redseer

On the D2C segment in particular, in 2022, there were around 500 million shipments, and forecasts suggest a significant rise to 3 billion by 2027.³⁵

Impact on Job Creation



Source: Economic Survey, Newspaper reports

With an impressive annual growth rate of 12%, the logistics sector will substantially impact job creation in India. The 2021 Economic Survey highlights the logistics industry's significant contribution as one of India's largest employers, engaging more than 22 million people in various roles.³⁶ These employment opportunities span diverse sectors within the industry, covering positions in transportation, warehousing, packaging, courier services, and more. Forecasts suggest that this industry is on track to generate 10 million new jobs by 2027.³⁷

³⁴ "India's E-commerce Logistics Market to Reach 10 B Parcels by FY28: Report," The Hindu Business Line. April 2023 Available at <https://www.thehindubusinessline.com/economy/logistics/indias-e-commerce-logistics-market-to-reach-10-b-parcels-by-fy28-report/article66720327.ece>

³⁵ Redseer Consulting, October 2023 Available at <https://redseer.com/newsletters/revolutionizing-d2c-logistics-3pl-mantras-for-success/>

³⁶ "Contribution of Shipping and Logistics Industry in Indian Economy," Times of India Blogs. March 2023. Available at <https://timesofindia.indiatimes.com/blogs/voices/contribution-of-shipping-and-logistics-industry-in-indian-economy/>

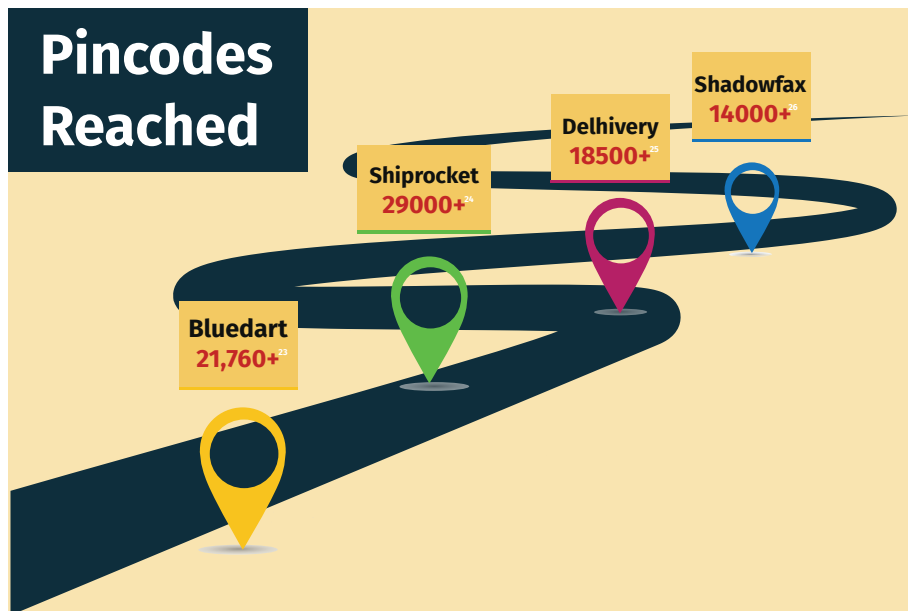
³⁷ "Rising Logistics Demand Expected to Create 10 Mn Jobs in India by 2027," Business Standard. September 2023. Available at https://www.business-standard.com/economy/news/rising-logistics-demand-expected-to-create-10-mn-jobs-in-india-by-2027-123092101259_1.html

Last Mile Delivery



The last-mile delivery logistics market in India is in the spotlight, with a projection from a Redseer report indicating it's on course to reach \$6 billion by 2024.³⁸ Notably, the broader road logistics sector, particularly last-mile delivery services is flourishing, accounting for 8% of India's overall GDP, a significant estimate. Furthermore, the last-mile delivery market is expected to grow substantially, with a remarkable compound annual growth rate (CAGR) of 15.62% from 2023 to 2027.³⁹ This expansion is driven by various factors, including the global e-commerce boom, increased demand for high-quality goods and delivery services, and the proliferation of warehouses.

Places previously perceived as unreachable are now accessible, thanks to the developments in the logistics industry. Online retailers offer delivery services to approximately 15,000-20,000 pin codes out of almost 100,000 pin codes across the country.⁴⁰



Source: Media reports, Shiprocket

38 "What is last-mile delivery logistics: A short guide" Tata Nexarc Blog. January 2023. Available at <https://blog.tatanexarc.com/logistics/what-is-last-mile-delivery/#:-:text=According%20to%20a%20Redseer%20report,the%20overall%20GDP%20of%20India>

39 "How Last-Mile Logistics Is Driving India's Growth: 5 Top Trends," LinkedIn Article. April 2023. Available at <https://www.linkedin.com/pulse/how-last-mile-logistics-driving-indias-growth-5-top-trends-dandera/>

40 "E-Commerce May 2023 Report," India Brand Equity Foundation (IBEF), May 2023. Available at https://www.ibef.org/download/1696307139_E-Commerce_May_2023.pdf

Case Study- Delhivery

Delhivery, a prominent player in India's logistics industry, faced initial challenges, including trust issues, warehousing, and fierce competition. However, the company adopted a range of strategic approaches to overcome these obstacles and emerge as a leading, fully integrated logistics provider. This case study explores Delhivery's journey, including key milestones and its remarkable revenue growth.

Challenges Faced: Delhivery initially grappled with challenges such as trust issues, warehousing limitations, and intense competition in the logistics sector.

Strategic Approaches: Delhivery adopted strategic initiatives to address these challenges, which included:

Zero Subscription Fees: The company eliminated subscription fees, making their services more accessible and attractive to customers.

Competitive Shipping Rates: Delhivery has offered competitive shipping rates, ensuring cost-effective solutions for its clients.

Diversification: Delhivery diversified its services by expanding into warehousing, transportation, and e-commerce solutions.

Key Milestones: Delhivery's journey is marked by significant achievements:

- Successfully delivering over 1 billion orders.
- Serving 18,000 pin codes, expanding its reach across the country.
- Establishing 2521 direct delivery centres, enabling round-the-clock operations.⁴¹

Achievements and Market Position: Today, Delhivery is a leading player in the Indian logistics industry, catering to B2B, B2C, and C2C segments. With competitive rates and a robust supply chain infrastructure, the company is well-positioned to continue on its growth trajectory.

Impressive Revenue Growth: In FY23, Delhivery achieved a remarkable 63% year-on-year (YoY) increase in revenue, reaching Rs. 72.41 billion, a substantial rise from Rs. 44.50 billion in the previous fiscal year. When analysing the reported revenue figures, the growth is even more striking, with an 89% increase, surging from Rs. 36.47 billion in FY21 to Rs. 68.82 billion in FY22.⁴²

Delhivery's strategic evolution, diversification, and competitive offerings have propelled the company to a leading position in India's logistics industry. With impressive revenue growth and a robust market presence, Delhivery continues to navigate the evolving logistical landscape, poised for sustained success. Acknowledging the sector's rapid growth, the company has recently expanded into quick commerce, seeing strong potential for its operations in this space.

⁴¹ "Delhivery Case Study", The Code Work, March 2023, Available at: <https://thecodework.com/explore/delhivery-case-study/>

⁴² "Delhivery Reports Revenue of Rs 7,241 Crore at 63% YoY Growth," LiveMint. May 2022 Available at <https://www.livemint.com/news/india/delhivery-reports-revenue-of-rs-7-241-crore-at-63-yoy-growth-11653932586295.html>

Case Study: Allcargo

Founded in 1993 in Mumbai, Allcargo has emerged as a prominent integrated logistics solutions provider in India. This case study delves into Allcargo's journey, beginning as a customs house agent and freight forwarder, and evolving into a comprehensive logistics service provider, offering a range of services including multimodal transportation, CFS operations, project cargo handling, ICD services, and more.

Historical Background

Allcargo's roots can be traced to its establishment in 1993, in Mumbai, India. The company initially began as a customs house agent and freight forwarder, operating within the logistics domain.

Evolution into Comprehensive Logistics Solutions:

Over the years, Allcargo underwent a significant transformation, expanding its service offerings to encompass a wide spectrum of logistics solutions. These include:

Multimodal Transportation: Allcargo broadened its capabilities to provide multimodal transportation services, facilitating the efficient movement of goods through various modes.

CFS Operations: The company ventured into Container Freight Station (CFS) operations, further enhancing its logistics support.

Project Cargo Handling: Allcargo demonstrated versatility by excelling in handling project cargo, which often involves intricate and specialised logistics.

ICD Services: It expanded into offering services related to Inland Container Depots (ICDs), bolstering its inland logistics support.

Leadership and Technological Innovation:

Under the guidance of Founder and Executive Chairman, Shashi Kiran Shetty, Allcargo embarked on a journey of technological innovation. The company embraced cutting-edge technology to optimise its operations and enhance efficiency. Furthermore, Allcargo showcased its commitment to sustainability, aligning itself with global trends in the logistics industry.

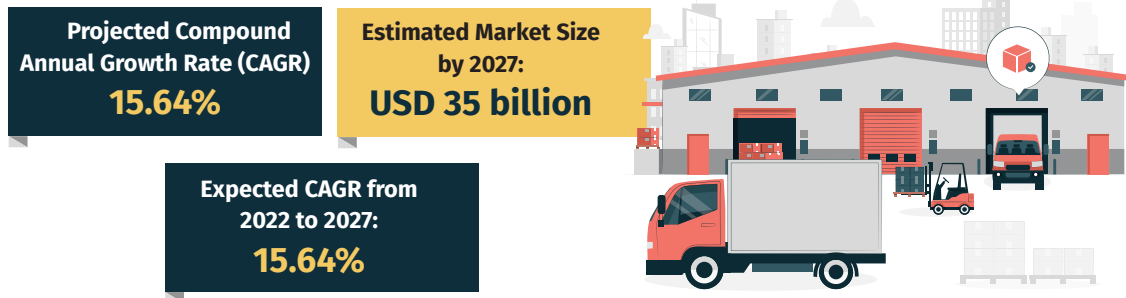
Market Position:

Today, Allcargo is a significant player in India's logistics industry, offering an extensive array of services and a technology-driven approach that sets it apart in the market.

Allcargo's evolution from a customs house agent and freight forwarder to a comprehensive logistics solutions provider showcases its adaptability and commitment to serving the diverse needs of the logistics industry. The company has embraced technology and sustainability and has solidified its position as a key player in India's logistics landscape, ensuring a promising future in the ever-evolving logistics sector.⁴³

Source: TheCodeWork.com

Growth in Warehousing due to E-commerce



Source: IMARC report

The warehousing storage sector, a subset of the broader logistics industry, has shown significant growth. According to IMARC Group, the Indian warehouse market was valued at USD 16.61 billion in 2023 and is expected to rise to USD 37.44 billion by 2032, with a projected CAGR of 9.2% between 2024 and 2032. The growing demand for warehouse facilities is driven primarily by sectors such as third-party logistics (3PL), manufacturing, retail, e-commerce, and fast-moving consumer goods (FMCG).⁴⁴



Source: IBEF

As a result of the e-commerce boom, the annual absorption of warehouse space in the top eight Indian cities is expected to rise to 76.2 million square feet by March 2026, marking a significant increase from the 31.7 million square feet recorded in 2021.⁴⁵

The festive season has led to a significant increase in sales from e-commerce platforms, prompting logistics companies to make substantial investments of over \$1 billion. These investments have been strategically distributed as follows:

1. 40% for expanding storage capacities in warehousing
2. A report by Indeed forecasts a 20% rise in seasonal jobs for 2024, driven by growth in metro cities and tier-II and III areas. While major metros like Mumbai, Bengaluru, and Delhi have seen an 18-20% increase, smaller cities like Nagpur, Jaipur, and Kochi show a sharper 22-25% surge. E-commerce is a key driver, with demand up 35% due to the boom in online shopping. Meesho, for instance, announced 0.85 million seasonal jobs, over 60% of which are in tier-III and IV regions.⁴⁶
3. 25% for technology improvements aimed at enhancing operational efficiency, accuracy, and last-mile delivery capabilities
4. The remaining 10% is allocated for various operational and infrastructure enhancements to meet the heightened demand⁴⁷

⁴⁴ "India's Grade A Warehouses Propel Sector's Exponential Growth Amid E-commerce Boom", Logistics Insider, May 2024. Available at <https://www.logisticsinsider.in/indias-grade-a-warehouses-propel-sectors-exponential-growth-amid-e-commerce-boom/>

⁴⁵ "E-Commerce May 2023 Report," India Brand Equity Foundation (IBEF), May 2023. Available at https://www.ibef.org/download/1696307139_E-Commerce_May_2023.pdf

⁴⁶ "Festive hiring to surge 20% in 2024; e-comm, logistics, q-commerce lead in job creation," Financial Express. September 2024. Available at: <https://www.financialexpress.com/jobs-career/festive-hiring-to-surge-20-in-2024-e-comm-logistics-q-commerce-lead-in-job-creation-3602807/>

⁴⁷ "Logistics Sector Investing \$1 Bn to Prep for Festive E-commerce Bonanza," Deccan Herald. October 2023. Available at: <https://www.deccanherald.com/business/logistics-sector-investing-1-bn-to-prep-for-festive-e-commerce-bonanza-2737535>

Challenges for Logistics: Crackers for Logistics or logistics for crackers?

The logistics industry has numerous challenges looming large, exerting a profound influence on the smooth and efficient flow of goods and services. These challenges are of immense significance for the operational prowess of businesses, playing a pivotal role in shaping customer satisfaction. Among the key challenges in logistics are issues related to:

Demand Fluctuations- The festive season in India witnesses a significant surge in consumer demand, particularly with the widespread adoption of e-commerce. This results in substantial online sales and a significant increase in order volumes, necessitating a flexible logistics strategy for effective management.

Traffic congestion- This is a byproduct of the growing demand for transportation services, particularly due to an increasing number of cargo vehicles on the road. This congestion can give rise to supply chain disruptions, resulting in delays that impact both inbound and outbound logistics.

Inventory Management- During the festive season, efficient inventory management is crucial. Companies must strike a balance to meet customer demand without excess holding costs. Clear insight into product availability is vital for both customers and business success. The challenge arises when there's a lack of transparency on inventory levels and shipment status, impacting customer inquiries and overall experience.

Last Mile Delivery- Punctual last-mile delivery is of primary importance, as delays of any nature could result in customer discontent. During the festive season, negative customer feedback can be more detrimental to businesses than at any other time.⁴⁸

Freight & Transportation Costs- Estimating freight and transportation expenses during this season is particularly challenging due to the unpredictable order volumes. Retailers like Amazon have set new industry standards with same-day and two-day shipping. However, swift delivery is just one aspect of interest for companies. This has forced many retailers to adopt similar practices for competitiveness, requiring adjustments to their transportation budgets. Balancing these factors is essential to navigating the festive season successfully.

Omni-channels- Omnichannel capabilities adoption is on the rise and could pose a challenge for businesses. Consumers have become accustomed to accessing products through various sales channels, including physical stores, mobile websites, apps, and third-party online marketplaces. According to Adobe Analytics, there has been a 39% increase in the number of Buy Online, Pick Up in Store (BOPIS) orders this year compared to 2018, and 37% of consumers intend to utilise the BOPIS option during the holiday season.⁴⁹

Challenges for Last Mile Delivery

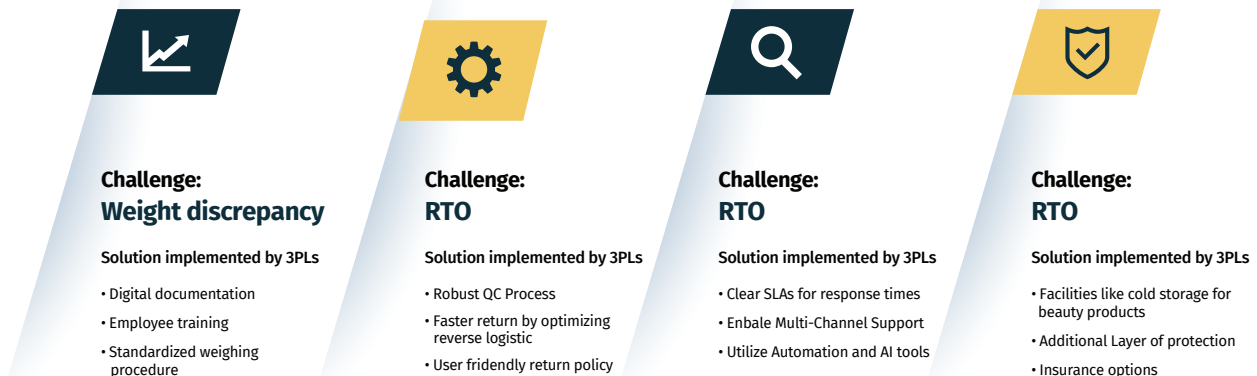
Contradiction between demand and supply: Due to the growth of e-commerce and a rising population, the volume of delivery orders has consistently increased. Ensuring consistent delivery service quality has become a challenge with the current delivery methods, workforce, and technology. High turnover rates among last-mile couriers are prevalent in the market, exacerbating difficulties in recruitment and rising labour costs. Consequently, last-mile delivery grapples with inefficiency, high expenses, and a subpar customer experience, including delays, incorrect deliveries, and delivery reattempts. Additionally, three evolving trends further complicate last-mile delivery: increased product variety, larger delivery parcels, and smaller batch sizes.

Environment protection: The logistics sector in India is currently grappling with pivotal challenges, particularly the need to significantly improve distribution efficiency and reduce overall energy consumption. There is a need for stakeholders to adopt sustainable and green practices to shrink carbon footprints and bolster environmental responsibility.

Safety and technology in Last-mile: Last-mile delivery grapples with safety concerns stemming from perilous three-wheel vehicles and traffic gridlocks. To secure the safety, efficiency, and convenience of the entire last-mile delivery system, urgent enhancements in technology and infrastructure are imperative.

3PL in India

Winning ingredient for 3 PL players



Source: Redseer

Third-party logistics (3PL) in India, with major players like DHL, Mahindra Logistics, and more, are vital for outsourcing logistics, distribution, and customs management. 3PL provides infrastructure and technology to streamline deliveries, allowing businesses to focus on core operations. One of the significant advantages of 3PL partnerships is their capacity to efficiently manage the challenging “last-mile” logistics, particularly during peak demand periods like festive seasons. This alleviates the operational burden on e-commerce companies that maintain their own delivery fleets. An illustrative example is Meesho, which collaborates with leading 3PL providers such as Delhivery and Ecom Express to augment its delivery infrastructure during festivals

What’s noteworthy is the growing importance of 3PL services as e-commerce ventures expand into smaller towns and cities. These partnerships ensure prompt and effective deliveries, contributing to heightened customer satisfaction. During the 2022 festive season, 3PL providers handled a substantial 40-50% of the total order fulfilment. They serve as unsung heroes behind the scenes, enhancing the overall online shopping experience for customers.

However, while 3PL holds immense potential, there are challenges in the sector, including issues like shipment protection, weight disputes, return-to-origin processes, and responsiveness. To address these challenges, 3PL companies employ a variety of solutions, including digital documentation, standardised weighing procedures, robust quality control, clear service level agreements, multi-channel support, automation, and specialised facilities like cold storage and insurance options.

Investment in warehousing

As the festive season approaches, there is a growing demand for warehousing due to the accumulation of inventory. To meet this demand, industry players are implementing strategies that involve flexible space management combined with long-term expansion plans tailored to regional demand trends. According to a recent report from Colliers India, the first three quarters of 2023 saw the leasing of 17 million square feet of space, with leasing activity experiencing a significant 55% surge in Q3 2023.⁵⁰

Flipkart has substantially expanded its operational footprint by acquiring 1.9 million square feet of space in various states, including Uttar Pradesh, Gujarat, Bihar, Punjab, Rajasthan, and Telangana.⁵¹

Shiprocket announced the expansion of their warehouse capacity to 2 million square feet, incorporating three state-of-the-art warehouses. This expansion was driven by the need to facilitate faster deliveries for merchants and meet consumers' demands for swift service. Additionally, Shiprocket has expanded its presence in the last-mile delivery network by launching multiple delivery centres nationwide.⁵²

The logistics firm Ecom Express is set to hire 35,000 delivery associates and 12,000 staff for its hubs, fulfilment, and sorting centres. This marks an increase from last year when it hired 30,000 people, ahead of the festive season.

Amazon is gearing up for the upcoming holiday season by bolstering its initiatives, including deepening its association with the Indian Railways, fortifying ties with small neighbourhood businesses, and concluding a deal with India Post to guarantee smooth worldwide shipping.⁵³ The company also announced over 110,000 seasonal job openings across its operations network to support the upcoming festival season and serve millions of customers nationwide.⁵⁴

Technological Innovations

According to a report from CII-Alvarez & Marsal, it is projected that by 2030, approximately 80% of warehouses in India will integrate some level of automation.⁵⁵ Nevertheless, industry experts note that India has been relatively sluggish in embracing technology in terms of logistics, although there have been incremental advancements.

The logistics industry finds itself grappling with a range of challenges, including notable issues such as inadequate infrastructure, intricate regulatory frameworks, and operational inefficiencies that plague the supply chain.

In light of these formidable obstacles, the logistics sector is embarking on a substantial transformation journey, powered by the advancement and adoption of technology.

50 "Logistics Sector Investing \$1 Bn to Prep for Festive E-commerce Bonanza," Deccan Herald. October 2023 Available at: <https://www.deccanherald.com/business/logistics-sector-investing-1-bn-to-prep-for-festive-e-commerce-bonanza-2737535>

51 "Logistics Service Providers Struggle to Balance Festive Season Hiring with Last-Mile Delivery Enhancements," Logistics Insider. Available at <https://www.logisticsinsider.in/logistics-service-providers-struggle-to-balance-festive-season-hiring-with-last-mile-delivery-enhancements/>

52 "Logistics And Support Partners Gear Up For India's E-commerce Extravaganza During Festive Season," Business World. October 2023. Available at <https://www.businessworld.in/article/Logistics-And-Support-Partners-Gear-Up-For-India-s-E-commerce-Extravaganza-During-Festive-Season/21-10-2023-495766/>

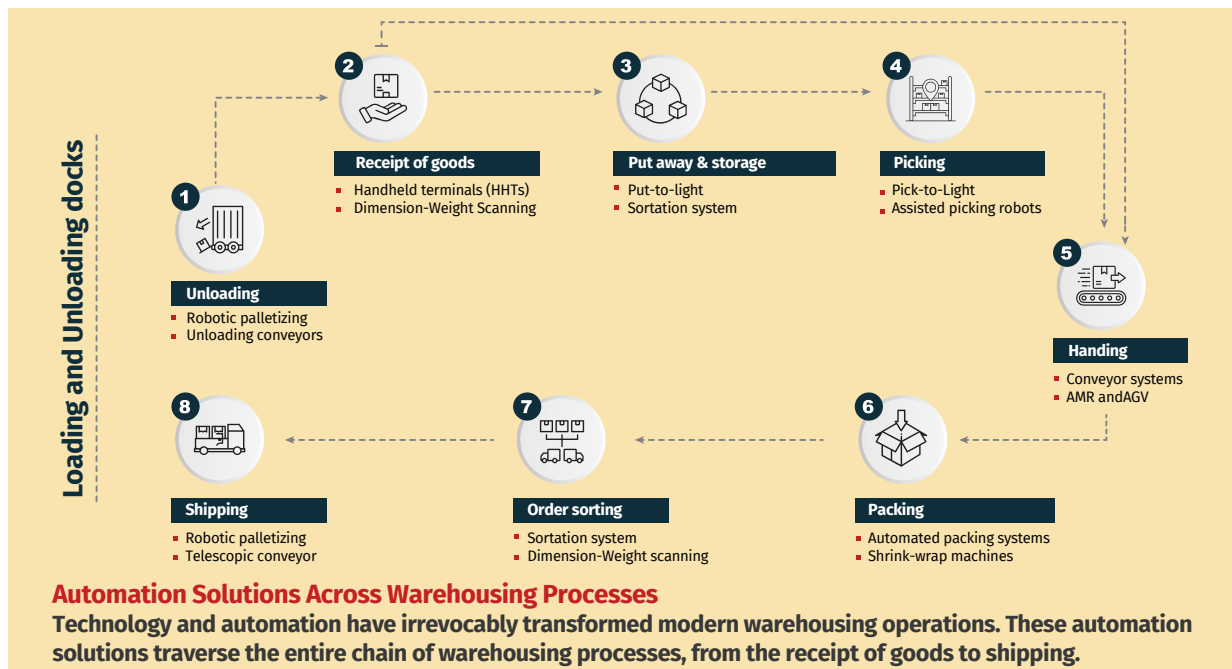
53 "Logistics Service Providers Struggle to Balance Festive Season Hiring with Last-Mile Delivery Enhancements," Logistics Insider. October 2023. Available at <https://www.logisticsinsider.in/logistics-service-providers-struggle-to-balance-festive-season-hiring-with-last-mile-delivery-enhancements/>

54 "Amazon India creates over 100K seasonal jobs ahead of festive season," Business Standard. September 2024. Available at https://www.business-standard.com/companies/news/amazon-india-creates-over-100k-seasonal-jobs-ahead-of-festive-season-124091201033_1.html

55 "Building Warehousing Competitiveness: Automation and Beyond Report". Alvarez & Marsal. Available at https://www.alvarezandmarsal.com/sites/default/files/2023-10/Building%20Warehousing%20Competitiveness_%20Automation%20and%20Beyond%20-%20report.pdf

- As e-commerce has surged in India, last-mile deliveries have become the norm and this heightened demand has stimulated substantial investments by companies in cutting-edge solutions. These include the utilisation of drones for delivering to remote areas, ongoing trials of autonomous vehicles for urban last-mile deliveries, and the growing popularity of electric vehicles.
- The logistics industry in India is witnessing a growing emphasis on sustainability and green practices, driven by a collective commitment to reduce carbon footprints and enhance environmental responsibility. These sustainable measures include the adoption of alternative fuels to power delivery fleets, optimisation of transportation routes to minimise emissions, and investments in energy-efficient technologies. Moreover, the Indian government is playing a pivotal role in promoting sustainability within the logistics sector.
- Automation within warehouses has fundamentally changed contemporary warehousing practices, encompassing the entire spectrum of warehouse operations, from the arrival of goods to their dispatch.⁵⁶

Automation in warehousing



Source: Alvarez and marsal

- Integration of Distributed Ledger Technology (DLT or blockchain) in the supply chain sector promises a data handling revolution. By providing secure storage and data sharing, blockchain enhances transparency and accountability in the supply chain, aiding in tracking goods and counterfeit detection. Soon, widespread adoption of blockchain technology is expected, paving the way for improved data management and a more efficient, and reliable supply chain.⁵⁷
- The Internet of Things (IoT) has revolutionised supply chain management by enhancing visibility and efficiency. IoT devices monitor and transfer data autonomously, improving inventory management and enabling predictive maintenance. It facilitates real-time inventory monitoring, automated reordering, and delivery tracking, offering businesses the opportunity to enhance productivity, reduce downtime, anticipate customer needs, and increase overall ROI throughout the supply chain.⁵⁸

⁵⁶ "Future of Logistics: Trends and Innovations Shaping the Industry in India," LinkedIn Article. March 2023. Available at <https://www.linkedin.com/pulse/future-logistics-trends-innovations-shaping-industry-india-singh/>

⁵⁷ "Technology Innovations in Supply Chains: Outlook for 2023," Times of India Blogs. March 2023. Available at <https://timesofindia.indiatimes.com/blogs/voices/technology-innovations-in-supply-chains-outlook-for-2023/>

⁵⁸ "Supply Chain Technology Trends," Navata. Available at <https://navata.com/cms/supply-chain-technology-trends/>

- As a highly intelligent solution, unmanned vehicles are expected to deliver obvious efficiency improvements. The current e-commerce platforms and logistics companies in the industry, including Cainiao and other leading enterprises, have begun using unmanned vehicle technology to improve last-mile delivery capabilities, overall distribution efficiency, and service quality. However, in the future, it will mainly face development limitations in terms of technology and cost, restrictions from regulations, and dilemmas related to the inability to enter households.

As a highly intelligent solution, drones are expected to be used for “urgent delivery” in urban and remote rural areas to achieve a more obvious delivery time, improving performance. Many leading enterprises, like Amazon, have begun to try using drone technology to improve last-mile delivery capabilities, including solving distribution problems in rural and remote areas. However, this intelligent device’s future faces safety and cost challenges. Meanwhile, obtaining a safe flight license in urban airspace for drones as general aviation is important. There will be more key pilots to face various ecological and regulatory challenges.

Reverse logistics involves the collection, transportation, and management of products and materials that are no longer desired or needed by the end user. This can include returns due to defects, warranty claims, excess inventory, recycling efforts, or even products at the end of their useful life.

The Evolution of Last-Mile Delivery in China

China's emphasis on enhancing last-mile delivery services has garnered considerable attention in recent years. This case study explores the pivotal steps taken at the national level to improve the coordination of e-commerce and express logistics, with a specific focus on optimising last-mile delivery services.

Background:

In 2018, the General Office of the State Council of China introduced a set of directives known as the "Opinions on Promoting the Coordinated Development of E-commerce and Express Logistics." These guidelines were formulated to promote synergy between the burgeoning e-commerce sector and the rapidly evolving express logistics industry. The Opinions outlined a comprehensive framework encompassing six key policies to foster this collaborative development.

Key Initiatives:

Optimizing Policy and Regulatory Environment: The Opinions recognised the need to create an environment conducive to the coordinated growth of e-commerce and express logistics. This included the streamlining of regulations and policies to facilitate smoother operations in this sector.

Enhancing E-commerce Express Logistics Infrastructure: Another crucial aspect addressed by the Opinions was the improvement of infrastructure supporting e-commerce express logistics. This entailed investments in transportation, warehousing, and distribution facilities to ensure efficiency and scalability.

Optimizing Traffic Management for E-commerce Delivery: To streamline the movement of goods, the Opinions called for improved traffic management practices for e-commerce deliveries. This was aimed at reducing congestion and delays during last-mile deliveries.

Improving Last-Mile Service Capacity: One of the central themes of the Opinions was the enhancement of last-mile service capabilities for express delivery companies. This included a focus on efficiency, speed, and customer satisfaction in the final leg of the delivery process.

Strengthening Standardization and Intelligence:

The Opinions promoted standardisation and the incorporation of intelligent solutions to enhance the overall efficiency and coordination of the e-commerce and express logistics ecosystem.

Embracing Green Concepts: Recognizing the importance of environmental sustainability, the Opinions encouraged the development of green supply chains within the sector.

Promotion of Service Innovation: The Opinions placed a significant emphasis on service innovation, aiming to raise the bar for last-mile delivery capabilities. It encouraged the integration of smart express boxes into convenience services and livelihood projects. Additionally, the adoption of other innovative smart delivery facilities was actively promoted.

Effective Resource Utilization: To achieve a higher degree of efficiency, the Opinions emphasised the effective organisation and integrated utilisation of last-mile delivery services, resources, and intensive services. This approach aimed to maximise the utility of available assets and streamline the last-mile delivery process.

China's commitment to improving last-mile delivery services through the "Opinions on Promoting the Coordinated Development of e-commerce and Express Logistics" underscores the nation's dedication to the growth and efficiency of the e-commerce and logistics express sectors. These policy measures have set the stage for significant improvements in last-mile delivery services and the entire supply chain ecosystem. As a result, China has made substantial progress in ensuring timely and convenient deliveries for its ever-growing e-commerce customer base.

Advancements in Unmanned Last-Mile Delivery Policy in the United States

The United States has emerged as a global leader in formulating progressive policies for unmanned vehicles, particularly in the domain of last-mile logistics delivery. This case study delves into the United States' innovative approach to regulating unmanned delivery products, with a specific emphasis on categorising them by size and instituting various regulations to promote safe and efficient last-mile deliveries.

Categorizing Unmanned Delivery Products:

The United States has devised a structured approach to regulate unmanned delivery products, categorising them into two distinct groups based on size for effective management:

Personal Delivery Equipment (PDD): This category pertains to small-sized unmanned delivery vehicles designed for personal and last-mile deliveries, primarily operating on sidewalks and pedestrian areas.

Low-Speed Motor Vehicles: Larger, motor-driven, driverless delivery vehicles fall under this category and are managed as low-speed motor vehicles.

Evolution of Regulations:

Since 2017, several U.S. states have been progressively introducing regulations governing the use of Personal Delivery Devices (PDD) in a bid to standardise the operation of small-sized unmanned delivery vehicles on sidewalks. These regulations aim to balance the convenience of last-mile deliveries with safety and pedestrian rights.

For low-speed motor-driven driverless delivery vehicles, the relevant regulations mandate the application for a test license to ensure adherence to safety standards and operational protocols.

Federal Exemption Application:

When deploying unmanned delivery low-speed vehicles without a cab on a large scale, operators are required to submit an exemption application to the National Highway Traffic Safety Administration (NHTSA), which operates under the United States Department of Transportation. This step ensures that large-scale deployment meets specific safety and operational criteria.

Passenger Protection Regulations for Driverless Cars (2022):

In a significant move in 2022, the NHTSA issued the first-ever "Passenger Protection Regulations of Driverless Cars." These groundbreaking regulations were designed to further accelerate the development of vehicle automation and promote the widespread commercial application of autonomous vehicles.

The United States has taken a proactive and innovative stance in regulating unmanned vehicles for last-mile logistics delivery, setting a benchmark for the world. The categorisation of unmanned delivery products by size, the evolution of state-level regulations, and the federal exemption process are all steps that underscore the nation's commitment to ensuring the safety, efficiency, and responsible adoption of autonomous technology in the last-mile delivery sector. The issuance of the "Passenger Protection Regulations of Driverless Cars" in 2022 demonstrates the country's dedication to advancing vehicle automation and fostering the growth of commercial applications, ushering in a new era for unmanned last-mile delivery in the United States.

Key Recommendations

India's festival season represents an extraordinary opportunity and a significant operational challenge for logistics providers. During this period, typically from August to December, the sector experiences demand surges above normal operational volumes. This dramatic increase in activity, coupled with customers' heightened expectations for rapid delivery and service quality creates a complex operating environment that requires careful planning and strategic execution.

These recommendations provide a comprehensive framework for logistics operators to navigate the complexities of festival season operations. They are derived from industry best practices, emerging technological capabilities, and lessons learned from successful implementations across the sector. While each organisation's specific needs may vary, these recommendations offer a robust foundation for building resilient and efficient logistics operations during peak festival periods.

The following strategic recommendations address key operational areas including demand forecasting, technology integration, risk management, and customer experience. They take immediate operational needs and long-term strategic objectives into account, providing a balanced approach to festival season logistics management.

a. Predictive Analytics and Inventory Optimization

The foundation of successful festival season management lies in sophisticated demand forecasting and intelligent inventory control. Organisations need forecasting models that effectively blend historical data with current market trends while accounting for regional festival variations and category-specific patterns. Modern inventory management systems should leverage these insights to maintain optimal stock levels through dynamic reorder points and automated replenishment triggers, ensuring efficient resource allocation across warehouses to meet localised demand spikes.

b. Integrated Technology Solutions

Modern logistics operations demand seamless integration of various technological solutions to create a unified operational ecosystem. AI-driven route optimisation systems should work in concert with real-time traffic data and weather forecasts, enabling dynamic adjustments to delivery schedules. Warehouse automation solutions need to extend beyond basic picking and sorting to include automated storage and retrieval systems, smart inventory management using IoT sensors, and computer vision systems for quality control.

c. Robust Contingency Management

Festival season operations require comprehensive risk management and contingency planning to handle unexpected challenges. Organisations should develop multi-tiered supplier networks with pre-negotiated capacity agreements for peak periods, supported by regional backup suppliers, alternative transportation providers, and temporary warehouse facilities for overflow storage. Clear escalation protocols and emergency response teams ensure swift resolution of critical situations.

d. Enhanced Customer Experience Management

Customer engagement during festival seasons must evolve beyond basic order updates to create meaningful connections. Proactive communication through preferred channels should include personalised delivery window selections and real-time order tracking with dynamic ETA updates. Regional language support and instant resolution options for delivery issues help maintain customer satisfaction during peak periods.

e. Quality Assurance and Safety Protocols

A robust quality management system forms the backbone of reliable festival season operations. This should encompass comprehensive product handling protocols, temperature-controlled environments for sensitive items, and regular quality audits. Enhanced workplace safety measures, including specialised training programs for seasonal staff and emergency response procedures, ensure smooth operations during peak periods.

f. Returns Management and Customer Support

An efficient returns management system becomes crucial during festival seasons when return volumes typically surge. Organisations should implement streamlined returns authorisation processes with multiple return options, quick refund processing, and systematic quality inspection procedures. Customer support capabilities need enhancement through AI-powered initial response systems backed by dedicated festival season support teams.

g. Sustainability and Analytics Integration

Environmental consciousness must be woven into operational strategies while maintaining efficiency. This includes strategic integration of electric vehicles for last-mile delivery, sustainable packaging solutions, and comprehensive waste reduction programs. Advanced analytics should focus on predictive maintenance, resource optimisation, and customer behaviour analysis to drive continuous improvement.

h. Hybrid Fulfilment Models

Modern fulfilment strategies require flexibility to meet varying demand patterns. Organisations should blend traditional warehouse operations with innovative solutions like dark stores in high-demand areas and mobile distribution centres for temporary deployment. Partner retail locations can serve as additional fulfilment points during peak periods.

i. Workforce Management

Effective workforce planning becomes critical during festival seasons when demand surges. Advanced workforce management systems should enable flexible scheduling and skills-based task allocation, supported by targeted training programs and performance-based incentive systems to maintain high productivity levels.

j. Network Optimization

Continuous refinement of distribution networks ensures optimal service delivery during peak periods. Organisations should focus on dynamic facility location planning and multi-modal transportation options, supported by strategic placement of cross-docking facilities and regional consolidation centres.

k. Industry Collaboration

Participation in industry-wide initiatives can create mutual benefits for all stakeholders. This includes involvement in shared infrastructure development projects, contribution to standardised operating procedures, and active participation in technology development partnerships that benefit the broader logistics ecosystem.

Organisations should approach these recommendations through a phased implementation strategy, prioritising critical capabilities for immediate festival seasons while building long-term strategic advantages. Regular evaluation of outcomes against defined success metrics ensures continuous improvement and adaptation to evolving market demands.

Conclusion

Gaining insight into the future hinges on recognizing the right signposts

The importance of the logistics sector in India's economic development is more evident than ever. A robust logistics industry can significantly bolster India's aspiration to become a manufacturing powerhouse, particularly with government initiatives like 'Make in India.' Increasingly, global companies view the world as a unified production and market base that a competitive logistics sector can effectively tap into. Over recent years, the industry has experienced rapid growth due to increased government investments, improved infrastructure, and enhanced access to global markets. However, our services are yet to leverage international opportunities, as several challenges hinder the sector's progress.

As India's festive season opens, consumer trends lean strongly in favour of online shopping, indicating an increasing preference for e-commerce. The sheer convenience of online commerce, particularly quick commerce facilitated by hyperlocal deliveries, and the FOMO (fear of missing out) factor that is driven by social media, has made online shopping an integral part of the consumer's plans to manage their shopping, party planning and other festive activities. Thanks to the proliferation of AI tools, we are seeing a rapid surge in hyperscaled personalisation of shopping experiences, with brands working on tailored promotions to attract customers.

In the years ahead, our objective is to establish a more robust logistics network within the country. By enhancing infrastructure planning, fostering greater collaboration among stakeholders, and improving operational efficiency, India aims to unlock the sector's untapped potential, which will drive economic growth.

The Transportation and Logistics (T&L) industry is undergoing significant transformation, akin to numerous other sectors. Similar to any period of change, this transformation presents both risks and opportunities. The industry is confronting new technologies, emerging market players, and shifting customer demands. Various paths are available to address these challenges, including gradual evolution and potentially more revolutionary approaches.

Similarly, the e-commerce industry has experienced remarkable growth in recent years, propelled mainly by the introduction of various technologies and of course, the internet. However, the surge in e-commerce also demands a robust logistics system to meet the needs of its customers. It's evident that e-commerce logistics, in particular, has recently emerged as one of the most profitable sectors globally due to the extensive range of collaborative services it provides.

Full-stack tech-enabled logistics service providers can cater to various segments within the Indian logistics market. There appears to be significant room for expansion as these tech-enabled logistics players explore adjacent areas like hyperlocal delivery, express delivery, trucking, and more. Added to all this is the inescapable issue of traffic management, generating widespread demand for better infrastructure, particularly road infrastructure, not just in the metros but also in tier-2 and tier-3 cities.

The message is unmistakable: logistics undeniably forms the backbone of India's economy. As industry participants prepare to seize upcoming opportunities, the sector stands on the precipice of transformative change. We can confidently assert that this is only the inception of an exciting journey.

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