Asia-Pacific Online Grocery Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Grocery, Supermarkets & General Retail (Retail)
> **Source:** https://www.mordorintelligence.com/industry-reports/asia-pacific-online-grocery-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 327.73 billion
Projected Forecast (2031)	USD 327.73 billion
Growth Rate (CAGR)	13.31 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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![Major players in Asia-Pacific Online Grocery industry](images/chart_2.png)

![Asia-Pacific Online Grocery Market (2026 - 2031)](images/chart_3.png)

![Asia-Pacific Online Grocery Market: Market Share by Delivery speed Category](images/chart_4.png)

![Asia-Pacific Online Grocery Market: Market Share by Delivery Channel](images/chart_5.png)

![Asia Pacific Online Grocery Market](images/chart_6.png)

![Icon](images/chart_7.png)

![footer background image](images/chart_9.png)

![Mordor Intelligence on Facebook](images/chart_11.svg)

![Mordor Intelligence on Pinterest](images/chart_13.svg)

![Mordor Intelligence on Instagram](images/chart_14.svg)

![ESOMAR](images/chart_16.png)

![GPTW](images/chart_18.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2021 - 2031 |
Forecast Data Period | 2026 - 2031 |
Base Year Market Size (2025) | USD 289.24 Billion |
Market Size (2026) | USD 327.73 Billion |
Market Size (2031) | USD 612.78 Billion |
Growth Rate (2026 - 2031) | 13.31 % |
Market Concentration | High |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Asia-Pacific Online Grocery Market Analysis by Mordor IntelligenceThe Asia-Pacific Online Grocery Delivery Market is expected to grow from USD 289.24 billion in 2025 to USD 327.73 billion in 2026 and is forecast to reach USD 612.78 billion by 2031 at a CAGR of 13.31% over 2026–2031. High smartphone penetration, scalable digital payments, and urban fulfillment models are driving a shift from planned stock-ups to smaller, instant purchases, emphasizing app-first shopping experiences. High-frequency digital payment systems like India's UPI enable near-instant grocery replenishment, boosting order frequency and repeat purchases in densely populated areas[1]GSMA Intelligence Team, "Digital Societies in Asia-Pacific," GSMA, gsma.com. Investments in cold chain infrastructure and automated fulfillment centers in Australia and Japan enhance freshness consistency and reduce cycle times for perishables, building trust in online fresh purchases. Policy frameworks in China and ASEAN promoting cross-border data flows, retail digitization, and instant retail align with platform strategies for sub-two-hour deliveries, bridging gaps with offline shopping experiences.

Key Report Takeaways

* By delivery speed, same-day and next-day services held 53.48% of the Asia-Pacific online grocery delivery market share in 2025, while the ≤30-minute category is forecast to post an 18.74% CAGR through 2031.
* By product type, staples and packaged goods led the Asia-Pacific online grocery delivery market with a 31.78% revenue share in 2025, while fresh produce is projected to expand at a 17.35% CAGR through 2031.
* By delivery channel, aggregator platforms commanded 71.86% share of the Asia-Pacific online grocery delivery market size in 2025, and direct-to-consumer models are advancing at a 15.92% CAGR through 2031.
* By geography, China accounted for 45.88% of the Asia-Pacific online grocery delivery market share in 2025, while India is recording the fastest CAGR of 16.55% to 2031.

Key Market Trends

Asia-Pacific Online Grocery Market Trends and InsightsDrivers Impact Analysis*

Drivers	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising online adoption of fresh and perishable grocery categories	+2.8%	Global, strongest in India, Southeast Asia, Australia	Medium term (2-4 years)
Smartphone penetration driving mobile-first grocery shopping behavior	+3.1%	Pan-regional, particularly India, Indonesia, Philippines, Vietnam	Short term (≤ 2 years)
Rapid growth of quick commerce for instant delivery needs	+4.2%	Urban cores in China, India, expanding in parts of Southeast Asia	Medium term (2-4 years)
Government support for digital infrastructure and e-commerce adoption	+3.3%	India, China, ASEAN member states	Long term (≥ 4 years)
Booming On-Platform Advertising Budgets Among FMCG Brands	+1.4%	China, India, Philippines, Thailand	Medium term (2-4 years)
Subscription-Based Delivery Models for Daily Essentials	+1.7%	Japan, Singapore, Australia, urban China	Long term (≥ 4 years)
Source: Mordor Intelligence			

Competitive Landscape

Competitive Landscape

The Asia-Pacific online grocery delivery market is moderately concentrated in large metropolitan areas but remains competitive across ecosystems, retailers, and aggregators, with a focus on speed, availability, and reliability. Leading platforms in China are expanding their warehouse networks to deliver daily necessities faster while establishing offline locations for near-instant service in high-density areas. Ecosystems are investing in hybrid warehouse-store formats, grocery subsidies, and merchant services to balance volume and profitability in fresh and ambient categories. In India, ecosystem players are scaling micro-fulfillment centers and fresh sourcing, while retailers with extensive store networks are developing direct-to-consumer (D2C) channels to improve data control and margins. Australian players are adopting dual-channel strategies, combining proprietary fulfillment with aggregator partnerships to extend reach for urgent deliveries while maintaining service quality for scheduled orders. Investments in automation, cold chain infrastructure, and policy-aligned capabilities are streamlining daily grocery delivery operations. Retail media and loyalty platforms are critical for margin defense, aligning with the focus on ecosystem-owned data and private-label growth.

Two-hour and sub-two-hour delivery depends on advancements in picking productivity, AI-driven forecasting, and slot management to maintain margins for perishable-heavy orders. Platforms are diversifying categories served through last-mile networks to increase order value and manage demand fluctuations. Expansion into Tier-2 locations requires aligning service promises with population density to ensure cost efficiency. Financial disclosures indicate a focus on warehouse automation, retail media, and scalable customer service. Ecosystems are integrating AI-driven fulfillment and customer support to manage peak demand, while retailers prioritize curbside pickup, "Direct to Boot," and rapid on-demand delivery. Policy measures on digital payments and data management are reducing barriers for small merchants and cross-border sellers, supporting disciplined growth in the market.

Asia-Pacific Online Grocery Industry Leaders* Alibaba Group

* JD.com

* Amazon

* Reliance Retail

* Flipkart

* *Disclaimer: Major Players sorted in no particular order

Component Component 3 Scope Of The Report Bottom

Asia-Pacific Online Grocery Market Report ScopeThe Asia-Pacific Online Grocery Delivery Market evaluates digital grocery fulfillment models, including rapid delivery, same-day, next-day, and scheduled services. It analyzes market size, growth projections, and segmentation by delivery speed, product type, delivery channel, and country-level geography. Key drivers include rising online adoption of perishables, smartphone-driven shopping, quick commerce expansion, and FMCG investments in digital promotions, while challenges such as last-mile delivery costs, cold-chain gaps, and competitive margin pressures are addressed. The report examines consumer behavior, regulatory frameworks, technological advancements, and competitive dynamics through market concentration, strategic initiatives, share analysis, and company profiles. Future opportunities and long-term trends are outlined, with values in USD billion.

By Delivery Speed≤30 Minutes |

Same-Day (2-12 h) and Next Day |
Scheduled (more than 24 h) |

Segmentation Accordion Item

By GeographyChina |
India |
Japan |
Australia |
Indonesia |
South Korea |
Thailand |
Singapore |
Vietnam |
Philippines |
Rest of Asia-Pacific |

Frequently Asked Questions

What is the current size and outlook of the Asia Pacific online grocery delivery market?

The Asia-Pacific online grocery delivery market size is USD 327.73 billion in 2026 and is forecast to reach USD 612.78 billion by 2031 at a 13.31% CAGR, supported by mobile adoption, digital payments, and rapid fulfillment models.

Which delivery speeds are shaping customer expectations in Asia-Pacific grocery?

Same-day and next-day held 53.48% share in 2025, while under-30-minute delivery is the fastest-growing at an 18.74% CAGR through 2031, anchored by dense micro-fulfillment and automation.

Which categories are driving growth within the Asia-Pacific online grocery delivery market?

Fresh produce is the primary growth lever with a 17.35% CAGR through 2031, while staples and packaged goods held 31.78% in 2025 as platforms invest to improve freshness consistency and reduce shrink. .

How is competition evolving between aggregators and D2C channels?

Aggregators held 71.86% in 2025, but D2C is projected to grow at 15.92% as retailers leverage store networks, micro-fulfillment, and loyalty ecosystems to control data and margins.

Which geographies lead and which are growing fastest in the region?

China led with 45.88% in 2025, while India is the fastest-growing with a 16.55% projected CAGR through 2031, aided by smartphone ubiquity and scalable digital payments.

What policy shifts matter most for Asia-Pacific grocery delivery to 2031?

Digital payments support in India and cross-border data harmonization under ASEAN's DEFA, along with China's instant retail policy backing, reduce friction and improve scalability for platforms .