India Q-Commerce Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** E-Commerce & Online Retail (Retail)
> **Source:** https://www.mordorintelligence.com/industry-reports/q-commerce-industry-in-india
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 3.65 billion
Projected Forecast (2031)	USD 3.65 billion
Growth Rate (CAGR)	12.74 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

`![Major players in India Q-Commerce industry](images/chart_2.png)`

`![India Q-Commerce Market (2026 - 2031)](images/chart_3.png)`

`![India Q-Commerce Market: Market Share by Product Category](images/chart_4.png)`

`![India Q-Commerce Market: Market Share by City Tier](images/chart_5.png)`

`![Q-Commerce Industry In India Concentration](images/chart_6.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)`

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period | 2020 - 2031 |
Forecast Data Period | 2026 - 2031 |
Historical Data Period | 2020 - 2024 |
Market Size (2026) | USD 3.65 Billion |
Market Size (2031) | USD 6.64 Billion |
Growth Rate (2026 - 2031) | 12.74 % |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

India Q-Commerce Market Analysis by Mordor IntelligenceThe India quick commerce market size stands at USD 3.65 billion in 2026, and it is forecast to reach USD 6.64 billion by 2031 at a 12.74% CAGR. This growth profile reflects a channel that has scaled nationwide and shifted from hyper-expansion toward profitable density in core catchments while testing expansion playbooks in secondary cities. Indian consumers increased spending on instant delivery formats through fiscal 2025, and platforms continued to strengthen category depth beyond grocery to capture larger baskets and improve contribution margins at the store level. The sector’s footprint covers more than 80 cities as of 2025, with density-led operations focused on short delivery radii and optimized assortment to sustain high on-time fulfillment rates. The format has gained a visible role within India’s wider e-retail habits, which positions the India quick commerce market as a structural part of the country’s digital shopping landscape.

Key Report Takeaways

* By product category, Grocery & Staples held 61.33% of the India quick commerce market share in 2025, while Electronics & Accessories is projected to expand at a 17.78% CAGR through 2031.
* By delivery time promise, the ≤10 minutes segment captured 62.24% of the India quick commerce market share in 2025, and the 11–30 minutes segment is projected to grow at a 15.39% CAGR through 2031.
* By city tier, Tier I Metros held 67.33% of the India quick commerce market share in 2025, and Tier II Cities are projected to expand at a 16.37% CAGR through 2031.
* By geography, West India accounted for 31.27% of the India quick commerce market share in 2025, and East India is projected to grow at a 14.44% CAGR through 2031.

Key Market Trends

India Q-Commerce Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rapid urbanization and lifestyle changes	+3.2%	Tier I Metros, expanding to Tier II cities	Medium term (2-4 years)
Growing demand for instant delivery	+4.1%	National, strongest in top 6 metros, rising in Tier II hubs	Short term (≤ 2 years)
Expansion of dark stores and micro-fulfilment centers	+2.8%	Metro cores first, scaling to Tier II clusters	Medium term (2-4 years)
Increasing smartphone and internet penetration	+2.3%	National, fastest adoption in Tier II/III	Long term (≥ 4 years)
Rising investment from e-commerce giants and start-ups	+2.6%	National, infrastructure in high-density zones	Medium term (2-4 years)
Source: Mordor Intelligence			

Competitive Landscape

Competitive Landscape

Competitive intensity is high, and three platforms account for more than 90% of the consolidated market in 2025. Blinkit leads with a share near 50% after integration with its parent and an inventory-led pivot that supports private label plans, which strengthens margin opportunities in the India quick commerce market. Swiggy Instamart leverages a large food delivery user base and disclosed strong year-on-year GOV growth in fiscal 2026 while investing in dark stores and promotions to scale faster. Zepto expanded its network and diversified categories, supported by fresh funding in 2025 that sustained city-level density efforts during late 2025. The top three continue to invest in speed, assortment, and user experience, which sustains strong retention in core catchments for the India quick commerce market.

Large incumbents strengthened their presence and widened competitive pressure in 2025. Reliance Retail scaled its quick commerce reach to over 1,000 cities and 5,000 pin codes, and it used store footprints as fulfillment nodes to expand coverage and density. Flipkart Minutes broadened its service and integrated with existing logistics capabilities to compress delivery times across key categories, which raised activity in major metros. Niche players with vertical strategies, including instant grocery and fashion pilots, created category-focused options without matching the full-stack reach of the top three. Consolidation pressures became visible in late 2025 as subscale operators faced funding gaps and ceded share to leaders in metro corridors. These shifts emphasize the importance of capital depth, city-level density, and operational discipline in the India quick commerce market.

Strategic levers include private labels, advertising monetization, and subscription programs that can raise margin mix without diluting service quality. Blinkit’s plans for private label expansion follow its inventory-led transition and can complement category mixes in core cities. Advertising monetization gained traction across large platforms and can provide a recurring revenue layer to fund service reliability and innovation. Technology remains a decisive differentiator, and operators apply data science to route optimization, workforce planning, and pin code-level assortment curation. Regulatory oversight increased during 2025, and consumer authorities secured compliance declarations from leading platforms on dark pattern elimination, which reinforces fair marketplace practices in the India quick commerce market. These elements combine to shape a concentrated market with ongoing innovation and clear pathways toward sustainable unit economics.

India Q-Commerce Industry Leaders* Blinkit (Blink Commerce Private Limited)

* Swiggy Limited

* Zepto Marketplace Private Limited

* bigbasket.com (Supermarket Grocery Supplies Pvt Ltd)

* Dunzo Daily

* *Disclaimer: Major Players sorted in no particular order

Scope Methodology P Space

For this study, the India q-commerce market is defined as the value of quick commerce services delivered through app or web ordering, where orders are picked locally and delivered to customers in a short time window, typically within minutes.

Scope exclusions: We exclude traditional e-commerce deliveries that follow scheduled logistics, and we also exclude offline retail sales that do not pass through a q-commerce fulfillment flow.

Segmentation Container

* By Product Category* Grocery & Staples
* Fresh Produce & Dairy
* Snacks & Beverages
* Personal Care & OTC Pharma
* Home & Cleaning Supplies
* Electronics & Accessories

* Pet Care
* Flowers & Gifts

* By Delivery Time Promise* ≤ 10 Minutes
* 11–30 Minutes
* 31–60 Minutes

* By City Tier* Tier I Metros
* Tier II Cities
* Tier III & Below

* By Region* North India
* South India
* West India
* East India
* Central

Frequently Asked Questions

What is the current size and growth outlook for the India quick commerce market?

The India quick commerce market size is USD 3.65 billion in 2026 and is projected to reach USD 6.64 billion by 2031 at a 12.74% CAGR.

Which product categories lead usage in India’s quick delivery space?

Grocery & Staples leads with 61.33% share in 2025, while Electronics & Accessories is the fastest-growing category through 2031.

Which delivery promise is most preferred by Indian consumers for quick commerce?

≤10 minutes captures 62.24% of orders in 2025, while 11–30 minutes grows fastest as platforms balance speed with broader assortment.

Which city tiers contribute most to instant delivery in India?

Tier I Metros hold a 67.33% share in 2025, and Tier II Cities post the highest growth as density pockets and logistics improve.

Which regions lead and grow fastest in India’s quick commerce?

West India leads with 31.27% share in 2025, and East India grows fastest at a 14.44% CAGR through 2031.