

THE ECOMMERCE GOLD RUSH IN INDIA

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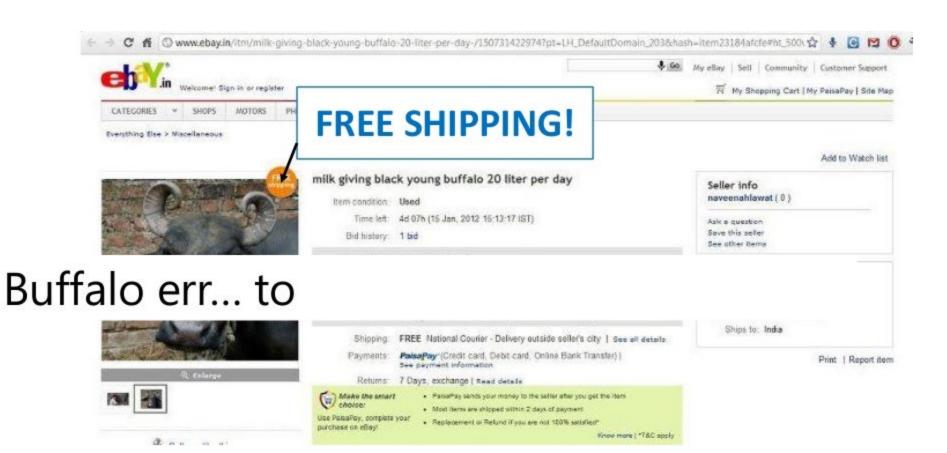
Trivia: What's happening here?



Offer Prasad to Lord Ram on Vivaah Panchmi

Everything is sold online from Prasad to...







Houses to...

multipurpose hall, retail zone, creche and retail spaces. To keep your fitness going, we also house a basketball court, volleyball court and a skating rink.

With the proposed metro station and easy connectivity to major highways, New Haven is on its way to becoming Bengaluru's next big location.

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AMENITIES NEIGHBOURHOOD

BOOK ONLINE * NOW FOR Rs. 30,000 ONLY

SELECT YOUR SPACE

2BHK COMPACT

2BHK OPTIMA

TIMA

LITE

YOUR APARTMENT COST

Rs. 36,99,266 Payment Breakup

Other Charges Apply

BOOK NOW FOR Rs. 30,000 ONLY

3BHK

sexual wellness products...





SWACHH BHARAT STORE >

WINTER CARNIVAL >

BEST SELLERS >

BROWSE

→ HEALTH, WELLNESS & (17130)MEDICINE

Massager & Pain Relief

Sexual Wellness (4072)

Weighing Scales & Daily (1507)Needs

Diabetic Care (498)

BP & Heart Rate Monitors (394)

Alternative Health (3494)

Therapies

Respiratory Care (142)

Hospital & Medical (678)

Equipment

Supports & Rehabilitation

Health, Wellness & Medicine Sexual Wellness =

SEXUAL WELLNESS VIEWALL >



Durex Play Vibrations

SENSUAL & STIMULATING SENSATIONS



SHOP>

SHOP PRIVATELY AT HOME 100 % PRIVACY GUARENTEED

KAMASUTRA

DUREX

WINTER CARNIVAL

SHOP PRIVATELY!

E-CIGARETTE

TALE OF TWO BILLION \$ STARTUPS AND AMAZON

⊑flipkart∞

snapdeal

Started in 2007 Valuation: \$7 Billion

GMV – \$1.5 Billion (2014) Total investments in Online Retail (including other players)
> \$4 Billion

amazon.in

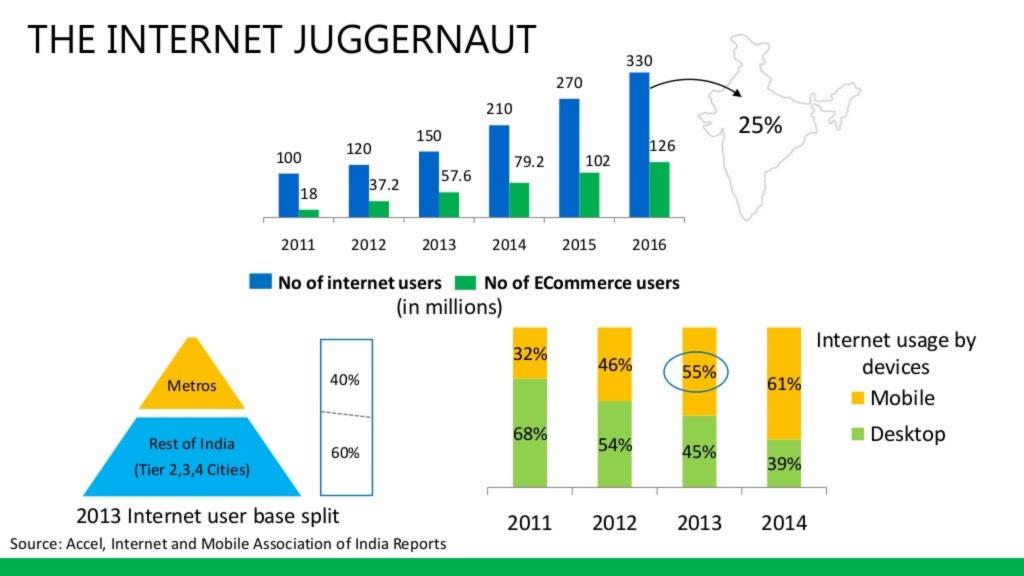
Started in 2010 Valuation: \$2 Billion

GMV – \$750 Million (2014)

Started in 2013 Announced \$2 Billion investment

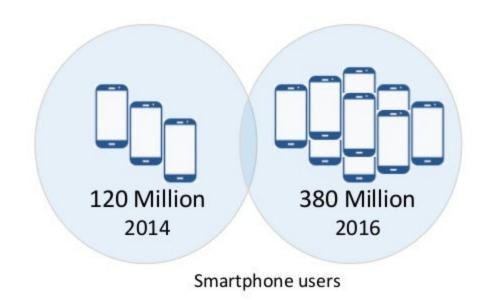
GMV – \$1 Billion (2014)

Source: Various news sites



ONE THING WHICH WILL CHANGE THE FUTURE







Source: Accel, Internet and Mobile Association of India Reports

DIGITAL AD SPEND IN INDIA

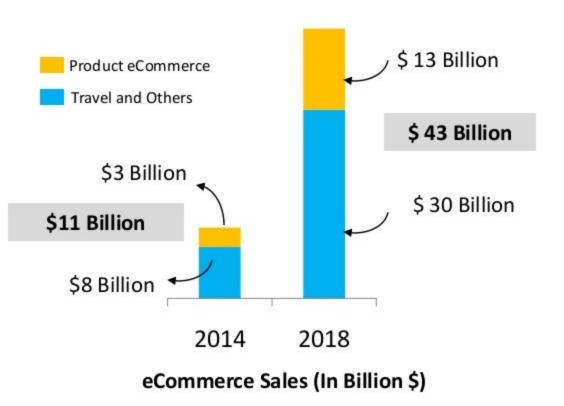
2012	2013	2014	2015	2016	CAGR
154	172	193	215	241	11.5%
130	148	170	197	230	14.7%
20	22	24	26	29	10.0%
20	26	34	44	57	29.9%
13	16	20	24	30	20.7%
337	384	440	506	586	14.3%
	154 130 20 20 20	154 172 130 148 20 22 20 26 13 16	154 172 193 130 148 170 20 22 24 20 26 34 13 16 20	154 172 193 215 130 148 170 197 20 22 24 26 20 26 34 44 13 16 20 24	154 172 193 215 241 130 148 170 197 230 20 22 24 26 29 20 26 34 44 57 13 16 20 24 30



Advertising spend (in INR Billions)

Source: Accel, KPMG Reports

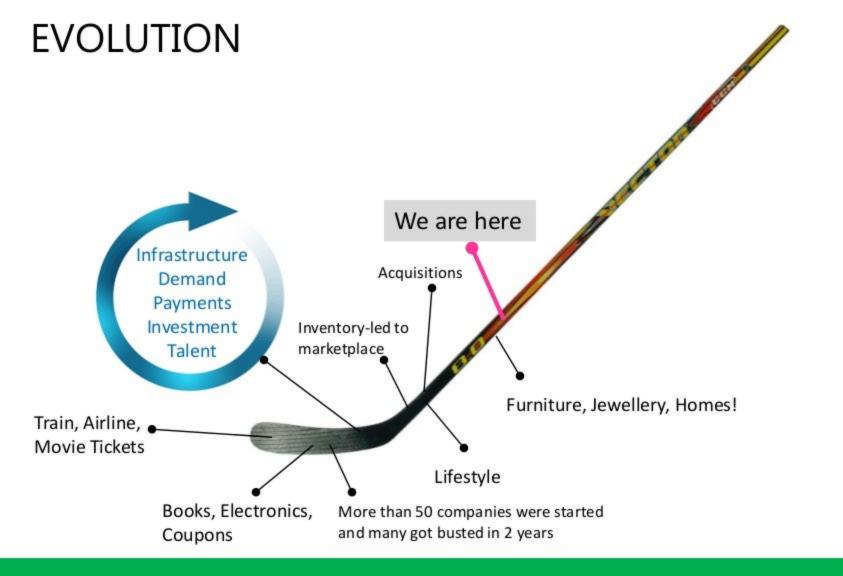
SHOW ME THE MONEY, HONEY!



Infrastructure Development
Smartphone Penetration
Payments
Best Prices available online
Convenience
Value Prop for customers

Drivers of growth

Source: Nomura Research, November 2014



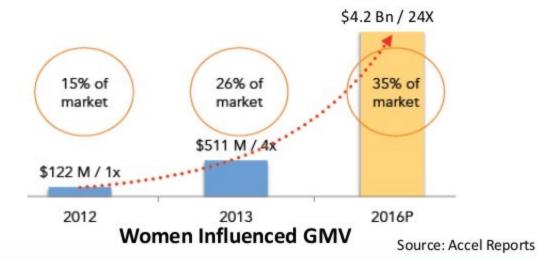
OPPORTUNITY ASSESMENT



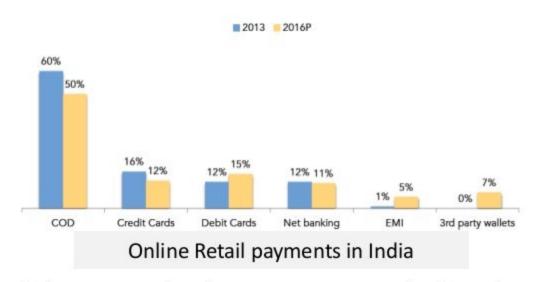
Mobile Commerce

55% 35% 8% 2% 26-35 yrs 36-45 yrs 18-35 yrs 45+ yrs

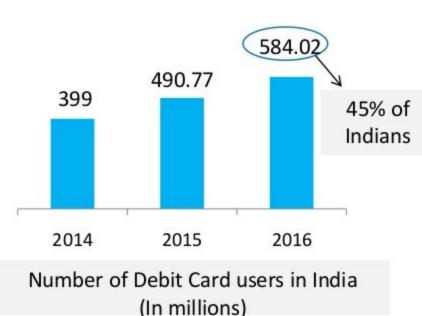
Online buyers profile



PAYMENTS LANDSCAPE

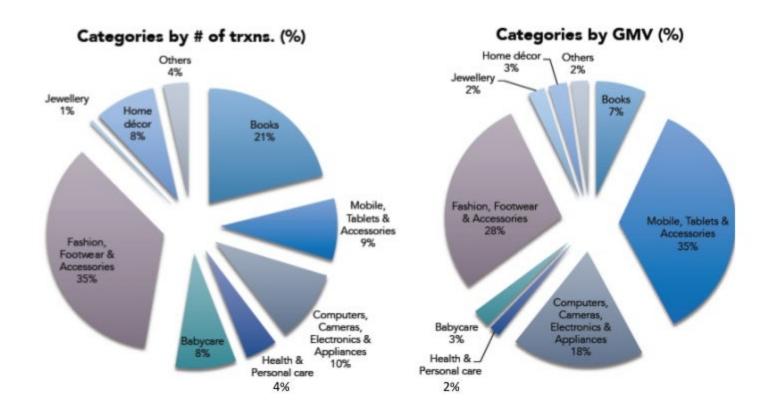


- With the increasing digital payments penetration, the share of COD shipments is reducing
- With increasing order values, we are seeing an uptick of EMI payments
- 3rd party wallets albeit a new phenomenon, have a strong value proposition and will be quick to become popular similar to China
- By 2016, half of Indians will have debit card!



Source: RBI Website and Accel Reports

ONLINE RETAIL- CATEGORY WISE BREAKUP

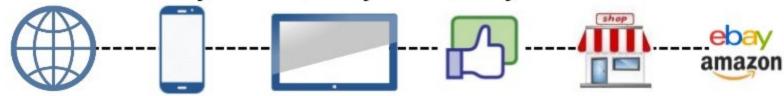


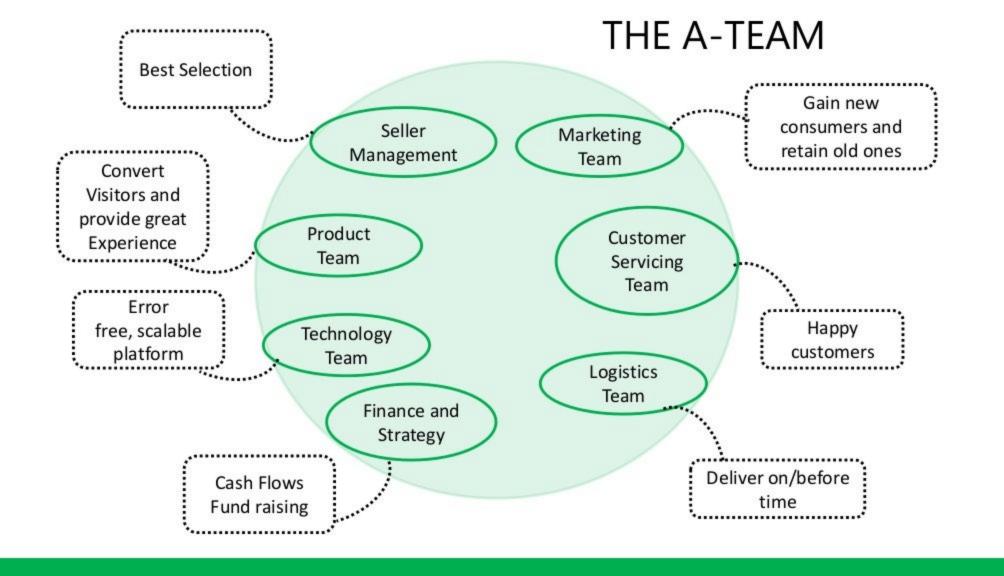
THE TWO SIDED BUSINESS MODEL E-Commerce Platform (Web and Mobile) Supply Demand Buy Payment integration **Critical Success Factors** Widest Selection Great Shopping Experience ■ Pricing (Its not about Logistics for discounts alone) Warehouse delivery

CONSUMERS EXPECT ALL TO ALL EXPERIENCE



Anywhere, Anytime, Any Channel





EVERYONE WANTS A SHARE OF PIE

RelianceFreshDirect.com to deliver fresh groceries in Mumbai

Shambhavi Anand, ET Bureau | Nov 17, 2014, 03.02PM IST

Inspired by Alibaba and its Indian clones, Tata Group to get into e-commerce space

stries BSE 1.01 % has taken baby e to deliver fresh grocery

HOME » INDUSTRY

FIRST PUBLISHED: THU, NOV 13 2014. 10 00 AM IST

KM Birla may follow Amazon into India ecommerce

The chairman of the Aditya Birla group says he is open to either acquiring e-retailers or building

Hindustan Unilever Ltd jumps on e-commerce bandwagon

ECOSYSTEM PLAYERS

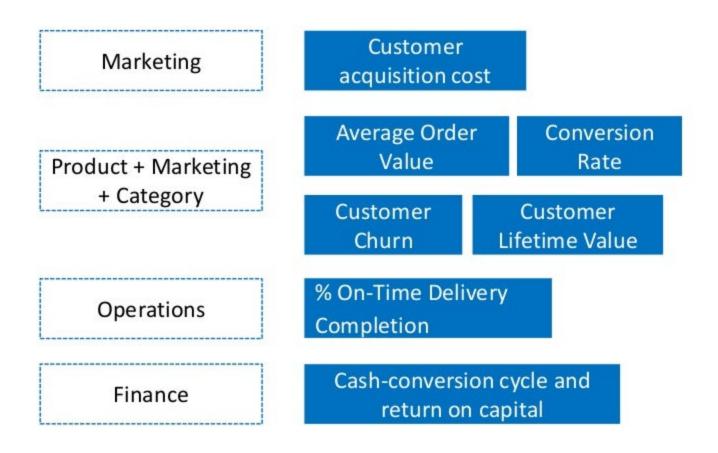
Marketplaces	Fashion	firstcry OD LADDER		Real Estate
amazon.in snapdeal	JABONG COM			Commonfloor 99acres.com®
Travel	Jobs	Transport	Recharge	Local
make trip cleartrip goibibo com	Cnaukri.com Timesjobs.com Matchmaking shaadicom Jeevansathi.com	TAXI FOR SURE	Freecharge.com Ticketing book myshow	omato POLX Quikr Justdial

ECOSYSTEM PLAYERS





BUSINESS METRICS



THE ECONOMIC TIMES

Jobs



PTI Oct 5, 2014, 11.28A

grads; Google...

August 8, 2014

BPOs start staff guidance programmes

June 21, 2004

Flexi staffing industry in the country to grow to 9 mn by ...

October 10, 2012

Tags: Urban Ladder | Suchita Dutta | Rajiv Srivatsa | net worth | managing director | Insurability | Amazor NEW DELHI: Its raining jobs in the e-commerce space as

this segment could grow at 20-25 per cent over the next 2-3 years in terms of jobs, salaries and growth, which in turn could create at least 1.50,000 jobs.

WHAT ARE THE OPPORTUNITIES?

Seller / Supply Side	Marketing	Product and Technology	Operations and Fulfilment	Strategy and Finance
 Business Development Category Management Onboading Training Account Management Alliances 	 Digital Marketing - SEO, PPC, Social ATL, BTL Analytics PR and Communication Brand Management Forecasting 	 Product Management Program Management Analytics 	Supply chain Warehousing Logistics Customer Service	 Planning and forecasting Fund Raising Cash flow management

Great Entrepreneurial opportunities in making the ecosystem robust – increasing retention, increasing logistics efficiency, analytics etc

THE PIONEERS









CONCERNS AND FUTURE



- Profitability
- Consolidation
- Top horizontal players
- Few niche players with unique selection
- Focus from discounting to customer experience
- Customer acquisition to retention
- Focus from GMV to Profitability

Books, Electronics, Coupons More than 50 companies were started and many got busted in 2 years

Thank You

