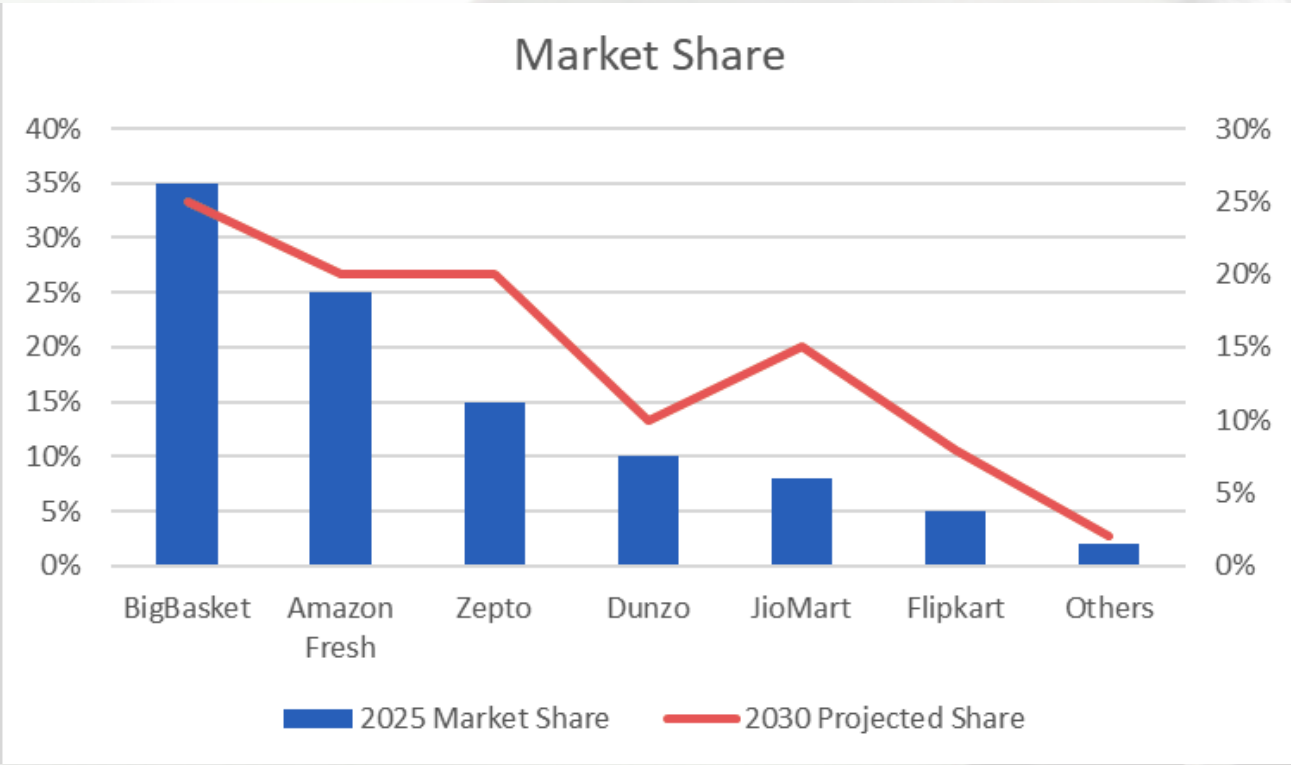


# INDIA'S SCHEDULED GROCERY DELIVERY MARKET

## Market Overview

**2025:** Market Size: ~\$12.16 billion  
User Penetration: ~17.5%  
Average Revenue Per User (ARPU): ~\$158.50

**2030:** Projected Market Size: ~\$77.72 billion  
Projected User Penetration: ~34%  
Projected ARPU: ~\$190



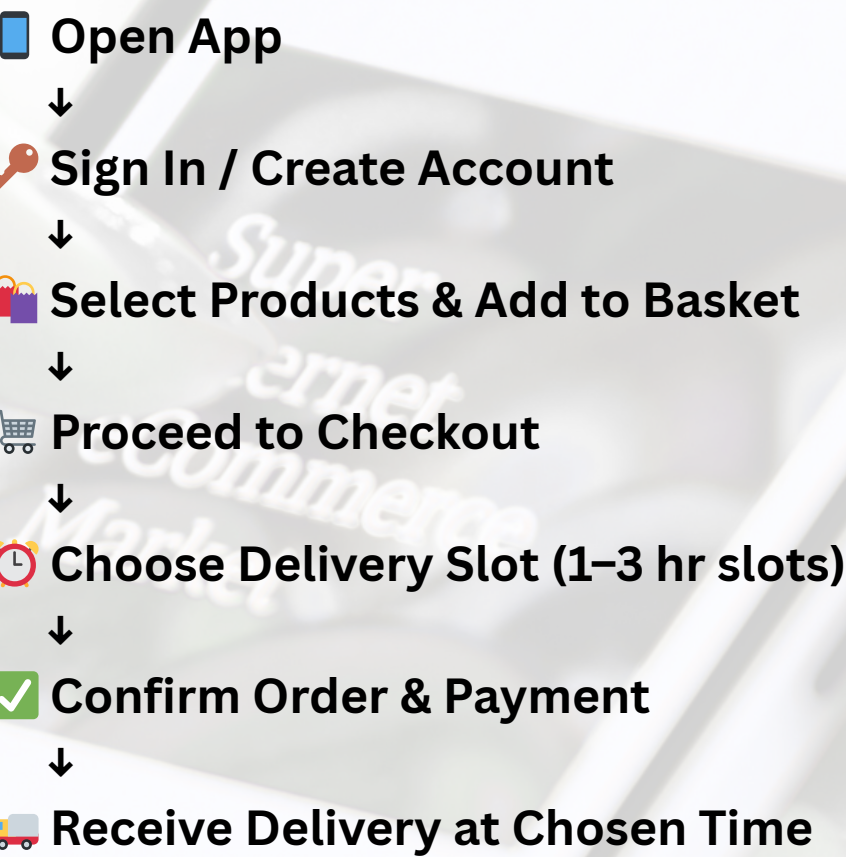
## Key Trends & Insights

**Growth Drivers:** Urbanization and changing consumer lifestyles.  
Increased internet and smartphone penetration.  
Convenience and time-saving aspects of online shopping.

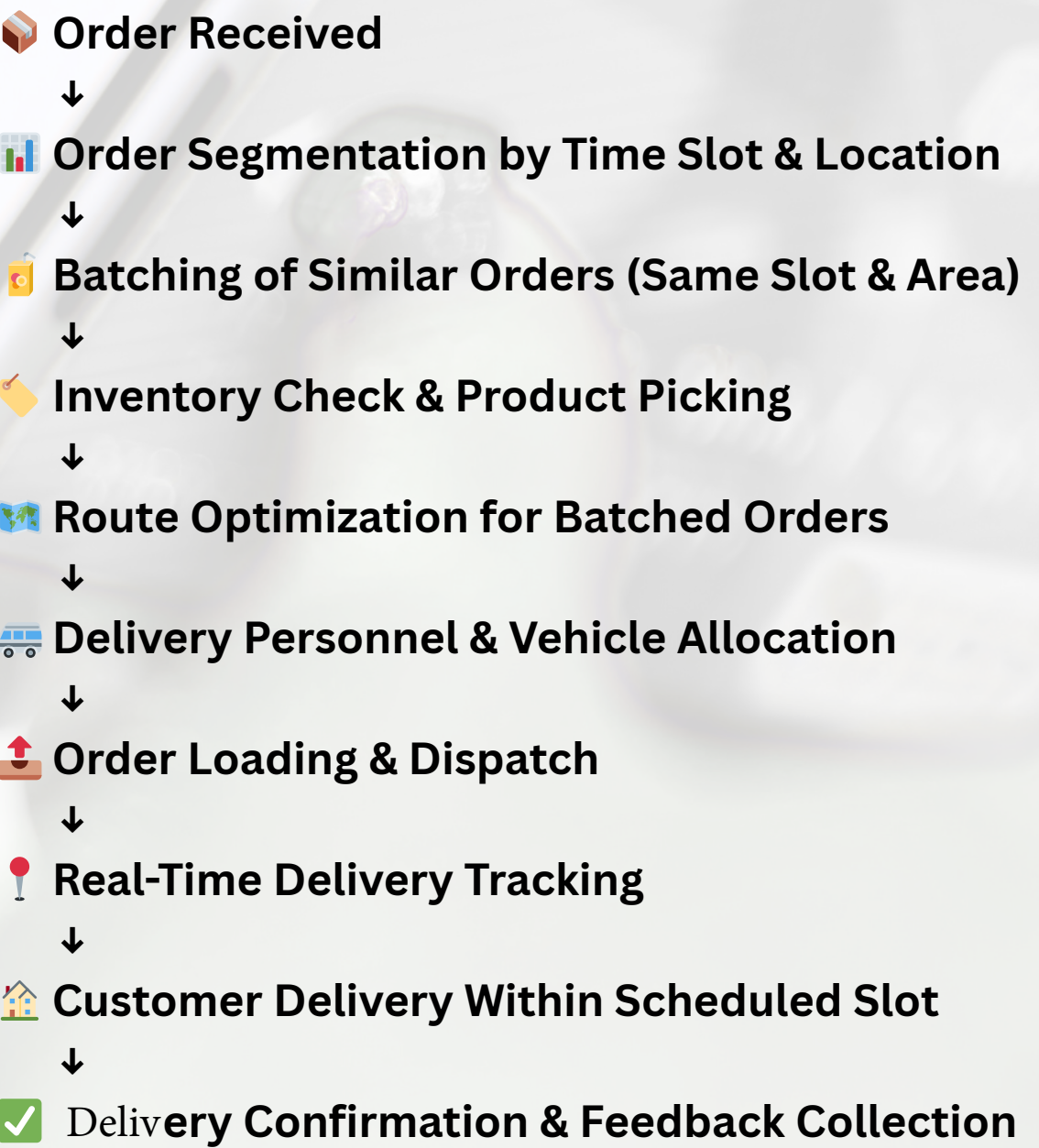
**Emerging Players:** Zepto and JioMart are projected to increase their market share by 2030, leveraging quick commerce and extensive retail networks.

**Consumer Behavior:** Shift towards scheduled deliveries for planned purchases, especially in categories like groceries, fruits, dairy, and household supplies.

## The Flow: User side



## The Flow: Operations side



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# ZEPTOS POSITIONING

## Zepto Product Breakdown: Instant vs. Scheduled Delivery

Product Construct: Instant Delivery	
Attribute	Description
Product Name	Zepto 10-Minute Delivery
Target Users	Urban professionals, college students, impulse buyers
Core JTBD (Job to Be Done)	“I need something urgently and I don’t have time to go to a store.”
Key Features	10-minute delivery, real-time tracking, small basket size
Order Size	Low (₹200–₹400 typically)
Delivery Slot	Immediate (ASAP)
Operational Model	High rider availability, dark stores within 2–3 km radius
Pain Points	High operational cost, low order value, unpredictable demand
Unit Economics	Negative or breakeven due to cost per delivery (~₹70–₹120)
Success Metrics	Retention rate, % of deliveries within SLA, order frequency

Product Construct: Scheduled Delivery	
Attribute	Description
Product Name	Zepto Scheduled Delivery
Target Users	Families, bulk buyers, working professionals
Core JTBD	“I want to plan my groceries for tomorrow morning at a lower delivery cost.”
Key Features	Time slot selection (e.g., 7–9 AM), order scheduling, larger basket
Order Size	Medium to high (₹500–₹1000+)
Delivery Slot	Pre-booked time windows (1–3 hours)
Operational Model	Batched deliveries, optimized routes, fewer trips
Pain Points Solved	Lower delivery cost, better demand forecasting, higher delivery success
Unit Economics	Positive or improving due to batching and higher AOV
Success Metrics	Slot fill rate, AOV, delivery success rate, repeat orders

### Financial Implications:

**Instant Delivery Model:** Zepto's rapid delivery service has led to significant cash burn. Reports indicate that the cost per delivery can range between ₹70–₹120, while the revenue per delivery often falls short, making profitability challenging.

**Scheduled Delivery Model:** By allowing customers to choose delivery slots, Zepto can batch orders and optimize delivery routes, leading to reduced fuel and labor costs. This model also encourages bulk purchases, increasing the average order value and improving overall profitability.

### Competitive Edge of Zepto

- Combines speed DNA of Q-commerce with scheduled reliability
- Uses dark stores to fulfill both instant and scheduled orders
- Quicker scheduled slots compared to traditional players (BigBasket, Amazon Fresh)

### Business Goal

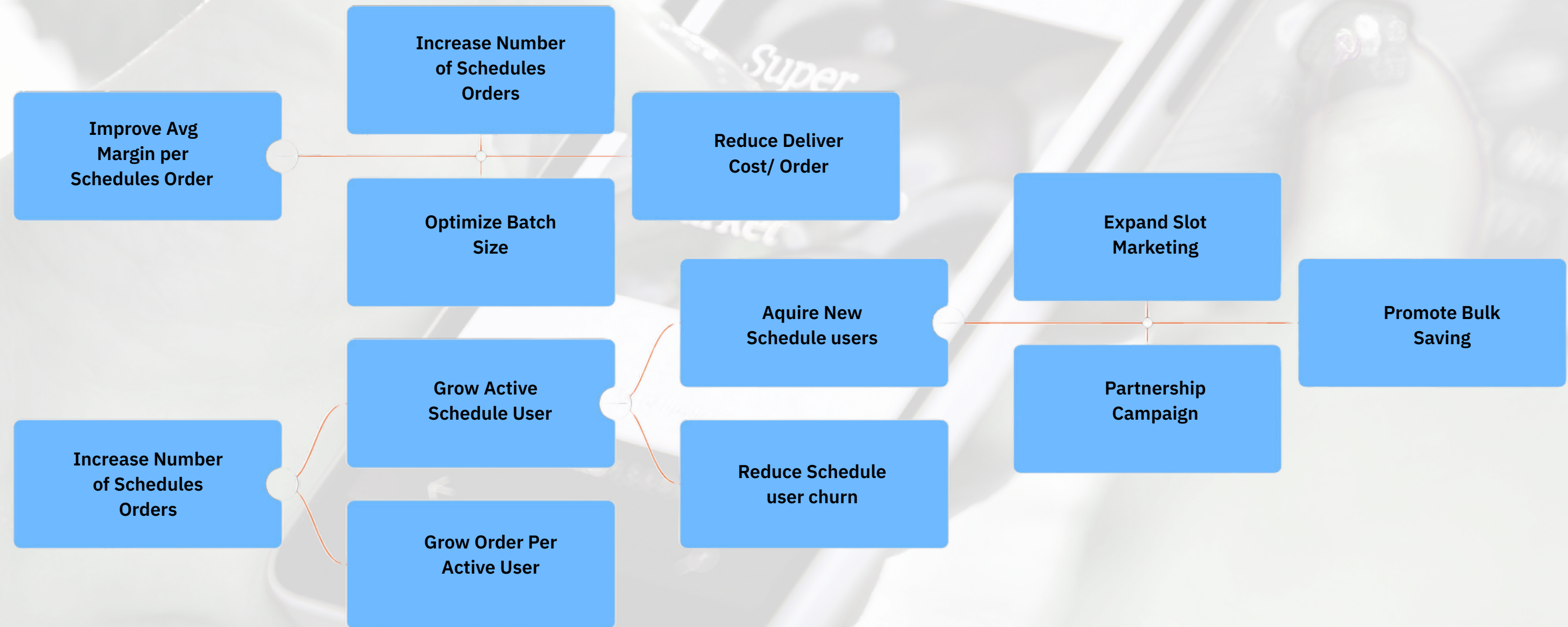
- Reduce high delivery costs from instant-only model
- Improve margins via higher AOV and fewer failed deliveries
- Serve a broader user base: families, planners, bulk buyers

“Zepto isn’t just built for speed—we’re built for your rhythm. From last-minute top-ups to your weekly stock-up, we deliver convenience on your clock.

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# KPI TREE FOR SCHEDULES ORDERS



# SOURCE:

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3. Economic Times Retail – JioMart’s Expansion into Quick Commerce
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5. BigBasket – App FAQs and Delivery Slots
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11. Dunzo – Business Model & Scheduled Delivery Flow
12. Zorp Blog – BigBasket’s Supply Chain and Operational Strategy
13. Deonde Blog – Blinkit Revenue and Delivery Model
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