

India Retail Logistics Market Assessment, By Type [Conventional Retail Logistics, E-commerce Retail Logistics], By Solution [Commerce Enablement, Supply Chain Solutions, Reverse Logistics and Liquidation, Transportation Management, Others], By Mode of Transport [Roadways, Railways, Airways, Waterways], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

India retail logistics market is projected to witness a CAGR of 12.67% during the forecast period FY2026-FY2033, growing from USD 10.83 billion in FY2025 to USD 28.13 billion in FY2033 due to advancements in technology, e-commerce boom, supportive government programs such as PM Gati Shakti, National Logistics Policy (NLP), and ULIP (Unified Logistics Interface Platform) which have catalyzed infrastructure upgrades and interoperability between logistics players coupled with innovations in private sector. Companies are now blending AI, IoT, and warehouse robotics into their retail logistics operations, aiming for faster turnarounds and better cost efficiency.

Retail logistics in India has moved beyond the simple movement of goods - it is now about velocity, visibility, and value-added integration. As India's retail ecosystem expands across metros and deep into Tier 2 and 3 cities, the demand for agile, tech-driven logistics is rising. The market is evolving to serve an increasingly digital and dispersed consumer base, with omnichannel fulfillment, express deliveries, and reverse logistics forming its new backbone.

Post-pandemic, the distinction between conventional and e-commerce retail logistics has blurred. Retailers now expect logistics partners to enable real-time inventory management, last-mile route optimization, and seamless return handling.

However, capacity gaps remain in multimodal connectivity, skilled workforce, and rural last-mile access. The next phase of growth will depend on how well logistics providers can scale not just operations, but also intelligence.

For instance, in June 2025, Shadowfax Technology Pvt. Ltd. announced plans to expand its electric vehicle (EV) fleet by adding 500-600 units each month. Currently, EVs power about 25% of its quick-commerce deliveries and account for 7-8% of total

deliveries, with a target to reach 15% EV-based deliveries by the end of 2025. The company operates EVs in seven major cities, including Bengaluru, Chennai, Mumbai, Pune, Hyderabad, NCR, and Jaipur, and plans to expand to 15-18 cities, including Tier 2 locations, by year-end. Shadowfax uses both chargeable battery and swappable battery EV models to maximize flexibility and uptime for delivery partners.

E-Commerce Boom and Tier-2 and 3 City Penetration Brings Market Growth

India's e-commerce boom has fundamentally reshaped logistics requirements. With over 190 million online shoppers projected by FY2025, the pressure to fulfil orders across semi-urban and rural India has intensified. Retailers and D2C brands are now demanding pan-India logistics networks with dynamic routing, hyperlocal delivery, and plug-and-play warehousing.

In November 2023, XpressBees (BusyBees Logistics Solutions Pvt Ltd.), a leading logistics firm, joined the Open Network for Digital Commerce (ONDC), enabling delivery services to over 20,000 pin codes across India. Leveraging ONDC's digital framework, XpressBees aims to optimize order processing, tracking, and timely deliveries, strengthening its position in India's e-commerce sector. Similarly, Shadowfax expanded its crowdsourced delivery fleet to service hyperlocal fashion and electronics orders for platforms such as Flipkart and Nykaa. This growth is matched by D2C brands launching pan-India campaigns, driving demand for agile, scalable, last-mile solutions.

Technology-Led Supply Chain Optimization to Shape the Market

Retail logistics is no longer about movement; it is about orchestration. Technology now plays a significant role in synchronizing supply chain nodes, predicting disruptions, managing returns, and improving operational KPIs.

In April 2024, Delhivery Ltd. mentioned quarterly results, unveiled Orion 3.0, an upgraded logistics platform with AI-powered delivery routing, automatic load balancing, and predictive Estimated Times of Arrival (ETAs). It helped reduce missed deliveries by 19% in Q1 FY25 and shortened average TAT (turnaround time) by 14% in Tier-1 cities.

Tech-first logistics is not a bonus anymore; it is a baseline. Platforms that lack API integrations, predictive analytics, or real-time dashboards are falling out of favour with both retailers and consumers.

E-Commerce Retail Logistics Segment Dominates the Global Market Share

Among all types, e-commerce retail logistics dominates the market, driven by higher order volumes, faster fulfilment cycles, and increased customer expectations for service transparency. This segment has driven most of the innovation: real-time tracking, reverse logistics flows, last-mile crowdsourcing, and delivery lockers. Logistics providers are investing heavily in this space to meet the needs of online-first retailers and D2C brands.

For instance, in February 2024, FedEx (Federal Express Corp) began piloting blockchain-powered smart contracts on select Asia-Europe freight corridors. These contracts automate payment upon delivery confirmation and integrate timestamped document verification, cutting dispute resolution times by over 60%, according to FedEx Innovation Lab.

Moreover, returns from online fashion and electronics purchases are pushing logistics firms to enhance reverse logistics efficiency, with some players offering real-time refund triggers upon pickup confirmation.

Key Players Landscape and Outlook

India's retail logistics sector is a blend of scale, specialization, and digital intelligence. Delhivery, with its pan-India reach and Orion tech platform, leads in large-scale e-commerce and reverse logistics. Blue Dart retains a stronghold in express air delivery and B2B retail, while DTDC is leaning into regional distribution and franchise-led growth. XpressBees and Shadowfax have become specialists in hyperlocal and D2C fulfilment. Safexpress and Mahindra Logistics cater to organized retail chains, especially FMCG and apparel. Meanwhile, Allcargo (via Gati) is betting on multimodal integrations and warehousing for end-to-end control. Recent developments such as TCI Express' investment in automated sortation hubs (March 2024) and Om Logistics' new mega warehouse in Haryana (June 2024) further signal that players are not just expanding network footprints - they are building smarter, faster, and more predictive logistics ecosystems.

For instance, in April 2025, Delhivery Ltd. signed a definitive agreement to acquire a controlling stake in Ecom Express Limited for approximately USD 170.7 million (INR 1,400 crore) in cash. The acquisition aims to enhance cost efficiency, speed, and reach across the Indian logistics sector by leveraging synergies in infrastructure, technology, and networks.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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