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India's Quick Commerce Scale-up

Decoding Dark Stores and
Urban Logistics Demand

REPORT

CBRE RESEARCH
October 2026

Executive Summary

Quick commerce is changing how consumption, fulfilment and urban logistics interact across India's largest and fastest-growing urban markets. At the centre of this model are dark stores, compact in-city facilities that bring inventory closer to consumers and enable faster replenishment, picking, packing and last-mile movement. The sector's growth reflects a broader shift in consumer behaviour, supported by rising digital access, seamless payments, dense catchments and a growing preference for frequent, app-led purchases.

For real estate, the implications are becoming more visible. India's dark-store network already occupies roughly **27 million sq. ft. of space**, supported by larger replenishment hubs that keep inventory moving across city-level networks. As platforms expand beyond groceries into wider categories and deepen their presence across emerging urban markets, real estate requirements are becoming more specialised. Ground-floor access, loading arrangements, cold-chain capability, rider movement, power supply, and catchment viability are now critical to assessing urban logistics spaces.

CBRE Research's latest report examines India's q-commerce ecosystem through this real estate lens. It traces the sector's evolution, key demand drivers, dark-store operating models, investment trends and operating considerations. It also assesses how future expansion models could shape urban warehousing demand, with q-commerce expected to drive an estimated **~75 million sq. ft. of cumulative urban logistics requirement by 2030**.



“~75 million sq. ft. of cumulative urban logistics requirement by 2030”

Contents

1. Market Context and Growth Drivers
2. The Real Estate Behind a Dark Store
3. Investment Trends
4. Key Considerations
5. The Way Forward





01 Market Context and Growth Drivers

India’s Quick Commerce Model in a Global Context

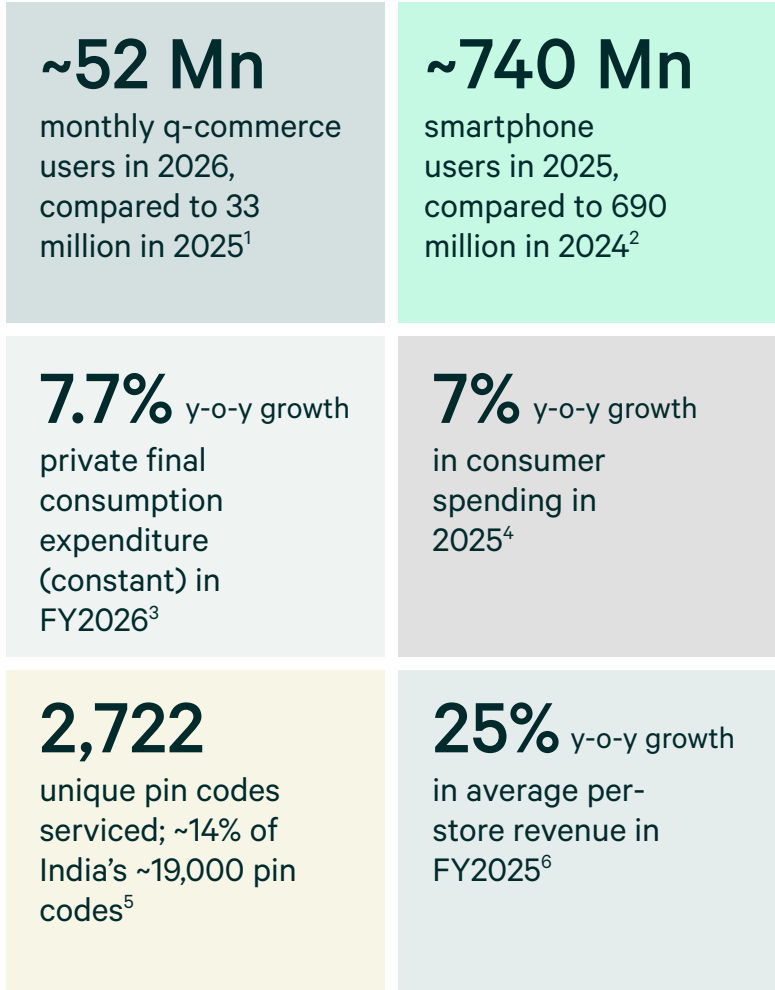
Quick commerce across various markets is founded on a consistent consumer promise of faster access to everyday purchases. However, fulfilment mechanisms differ by region. Certain markets utilise purpose-built dark stores, while others leverage existing retail stores as local fulfilment nodes or broker orders from neighbourhood shops through established delivery fleets. These operational choices influence the fixed-cost structure, delivery economics, and breakeven thresholds unique to each market. The following snapshot compares the adaptation of this model in major markets, noting that India aligns more closely with the dark-store-led approach.



India's Story: Moving from Speed to Scale

India's q-commerce model has evolved from scheduled online deliveries to a hyperlocal fulfilment system. Orders are now typically fulfilled within 10-30 minutes through a network of dark stores, or micro-warehouses, positioned within 2-3 kilometres of consumers and powered by AI-driven demand forecasting, real-time inventory management, and last-mile logistics.

Figure 1.2: India's q-commerce scale indicators



Source: 1. Quick Commerce Finds Its New Normal with Scale, Mix, and Momentum, Redseer Strategy Consultants, February 2026; 2. Publicly available information, February 2026; 3. Ministry of Statistics & Programme Implementation, June 2026; 4. Oxford Economics, Q3 2026; 5. Publicly available information, July 2026; 6. The Quick Commerce Playbook, MMA Global India & Publicis Commerce, October 2025; CBRE Research, Q3 2026. Note: The rapid-delivery phase was earlier associated with "10-minute delivery"; following a regulatory nudge, platform communication has shifted towards quicker/faster delivery instead of specific time-bound promises.

Figure 1.3: Evolution of e-commerce and q-commerce in India



Growth Drivers: Digital Readiness and Convenience Drive Adoption



Source: 1. Ministry of Communications, June 2026; 2. Ministry of Finance, August 2026; 3. Comprehensive Modular Survey: Telecom, 2025, Ministry of Statistics and Programme Implementation, May 2025; 4. Speed in Metro, Scale in Bharat: India's \$80 Bn Online Retail Story, Redseer Strategy Consultants, May 2026; 5. Publicly available information, August 2026; 6. The \$250 Billion Commerce Frontier - How Inspired, Immersive, Instant, and Intelligent forces are fueling the next wave of growth, Google and Deloitte, April 2026; 7. State of the Consumer 2025: When disruption becomes permanent, McKinsey & Company, June 2025; 8. World Population Review, August 2026; 9. Oxford Economics, August 2026. | Note: *UPI=Unified Payments Interface, an instant payment system that enables real-time bank-to-bank payments through mobile platforms. **USD-INR conversion is based on the exchange rate as of 25 August 2026.



DIGITAL AND PAYMENT READINESS

India's expanding internet base and adoption of digital payments are making app-based purchases faster and easier.

- **Wireless internet base:** India had 1.05 billion wireless internet subscribers as of end-March 2026—a large mobile-first base for app-led commerce¹
- **UPI-led payments:** UPI* accounted for 84% of India's digital payment transactions in FY2026, processing over 240 billion transactions worth around INR 314 lakh crore (over USD 3 trillion)**, supporting low-friction, repeat purchases.²
- **Household access:** More than 85% of Indian households own at least one smartphone.³



WIDER BASKETS AND CATEGORIES

Category expansion is widening q-commerce's use cases beyond purchases of grocery and daily essentials.

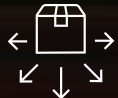
- **Future mix:** High –margin non-food categories, which are already recording robust growth, are expected to account for up to 45% of q-commerce spends by 2030.⁶
- **Speed preference:** Market surveys in 2025 indicate that 75% of consumers prioritised delivery speed over discounts/delivery costs.⁷



URBANISATION-DRIVEN LIFESTYLE TRANSFORMATION

Urban density, higher incomes and non-metro growth are set to spur q-commerce demand:

- **High population density:** India has a population density of 496 people per sq. km, with compact catchments strengthening per dark store unit economics.⁸
- **Income support:** India's household disposable income has risen from USD 7,190 in 2024 to USD 7,970 in 2026 and is projected to reach USD 9,500 in 2030, supporting convenience-led and premium purchases.⁹
- **Non-metro base:** Around 110 million new users from tier-II and smaller towns began shopping online over the last five years, which is widening the addressable base beyond metro cities.⁶



ADOPTION AT SCALE

Q-commerce usage is deepening, with more active users and higher daily order volumes pointing to regular purchase behaviour.

- **Retail share:** Q-commerce reached 17% of India's total online retail market in FY2026, growing 120% Y-o-Y, highlighting its rising role in urban online consumption.⁴
- **Volume spike:** Quick commerce order volumes surged past 9 million orders per day in August 2026, indicating stronger repeat usage.⁵

01 INBOUND ROUTING

Trucks from mother hubs arrive during early-morning hours. Stock is scanned in and stacked on shelves based on each item's order frequency.

02 VICINITY CHECK

The Order Management System (OMS) checks the customer's location using geofencing and geo-analytics and routes the order to the nearest dark store with the required items in stock.

03 ORDER ROUTING

Once the order is placed, the dark store's Warehouse Management System (WMS) processes it and generates an optimised pick list on the picker's handheld device or radio frequency (RF) scanner, based on shelf locations, to reduce picking time.

04 BATCH PICKING

To maximise speed, the system groups orders with identical or nearby items. The picker moves through the aisles once, following an optimised walking path generated by an algorithm, and pulls the combined quantity required for the batch.

A Logistics Sprint: The Eight-step Journey of a Q-commerce order

05 ITEM SCANNING

The picker collects items from the shelves and scans their barcodes. This updates digital inventory and ensures that the correct item, size and variant are selected.

06 SORTING AND ZONING

For orders containing frozen, chilled, and ambient items, different pickers may collect products from their respective temperature zones at the same time. These items are then brought to a sorting station and merged into a single order.

07 QUALITY CHECK & PACKAGING

At the dispatch desk, a packer conducts a quick check against the digital order screen. Items are then packed into bags/ insulated delivery containers.

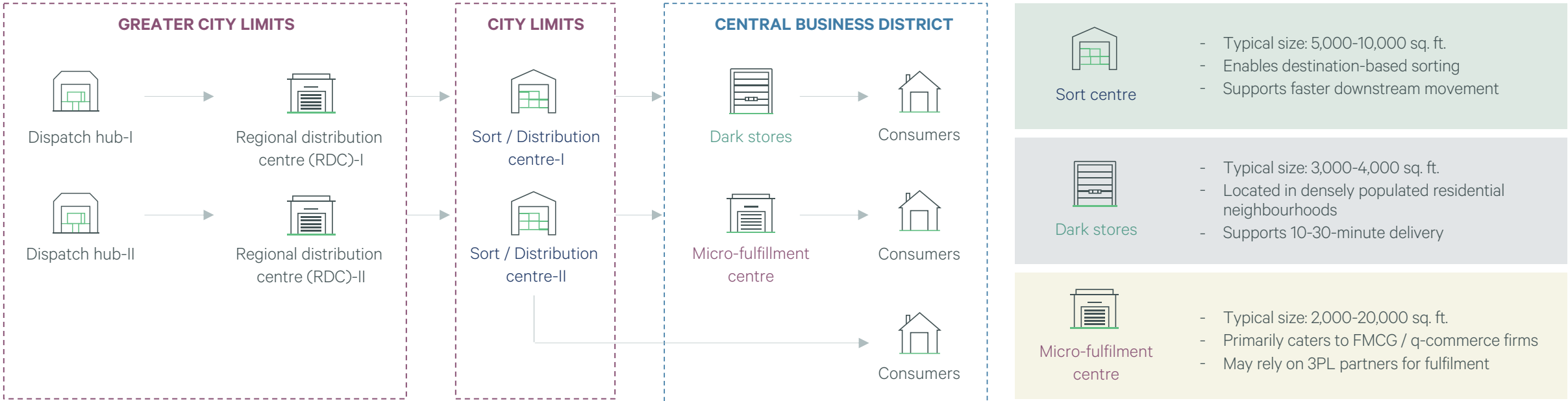
08 RIDER HANDOVER AND DELIVERY

The packed order is placed in a designated dispatch area or handed directly to a waiting delivery rider through a pick-up window, initiating the last-mile delivery phase.



Last-mile Fulfilment Formats in the Q-commerce Value Chain

Indicative flow of last-mile fulfilment formats across city networks



Source: CBRE Research, Q3 2026





02 The Real Estate Behind a Dark Store

Real Estate Requirements of a Dark Store



SPACE & STRUCTURAL LAYOUT

Dark stores typically require a minimum usable **area of 1,500-4,000 sq. ft. Compact formats of 800-1,200 sq. ft.** may be tested in tier-II cities with limited SKU counts, but the **3,000-4,000 sq. ft. range remains the standard for most tier-I cities.**

Heavy steel storage racks stacked with high-density goods can exert significant load on the floor plate. Ground-floor or structurally reinforced spaces are therefore preferred; basements may be considered if they have wide, easy-to-access ramps.

High vertical clearance is required to allow multi-tier racking of industrial pallets. Most dark stores seek a minimum clear height of around 9 feet, along with levelled flooring.



POWER AND UTILITIES

Three-phase connection: Access to a stable, industrial-grade three-phase power supply.

Electrical capacity: A minimum sanctioned load of 30 kW is typically required to operate walk-in cold rooms and sub-zero deep freezers for ice creams and other frozen foods.

Power backup: The property should have a dedicated external alcove for a diesel generator (DG) backup unit to protect cold rooms during power cuts.



LOGISTICS ACCESS

Fleet staging pocket: Street-front access is critical. The property must provide dedicated off-street parking for 35-40 bikes and enough space for riders to wait for bags without spilling onto public roads.

Inbound vehicle clearance: Clear vehicle movement is required. Mid-sized supply trucks should be able to access the loading bay smoothly for high-volume restocking.



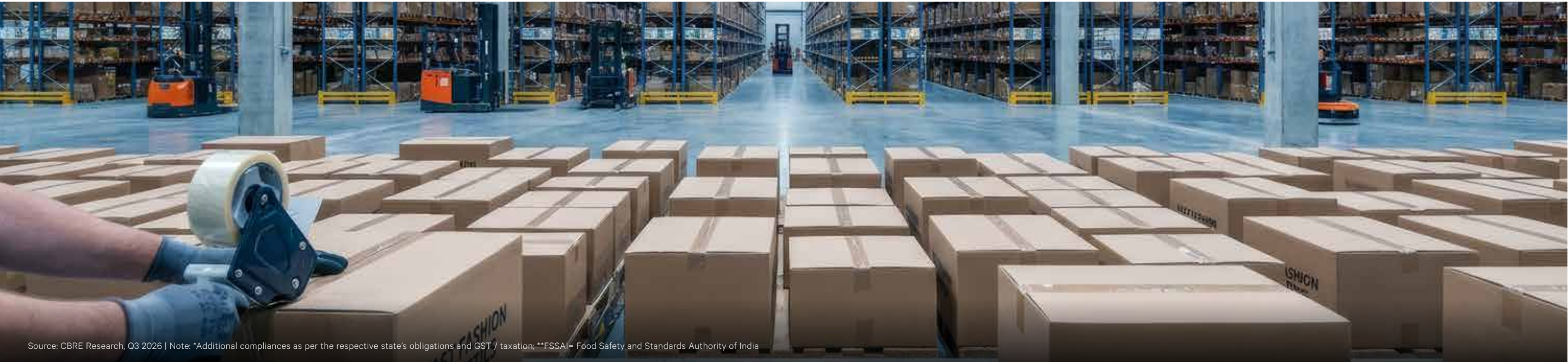
KEY COMPLIANCES*

FSSAI licence:** Since dark stores handle packaged food, beverages, dairy and related food products, an FSSAI licence is mandatory. The licence category depends on annual turnover and the nature of products handled.

Trade licence: Issued by the local municipal corporation and typically renewed annually.

Shops and establishments registration: Required in most states if paid employees work on the premises.

Fire NOC: Required in many states for commercial storage operations above specified area thresholds.



Source: CBRE Research, Q3 2026 | Note: *Additional compliances as per the respective state's obligations and GST / taxation; **FSSAI= Food Safety and Standards Authority of India

Inside a Dark Store: Designed for Dispatch, Not Display

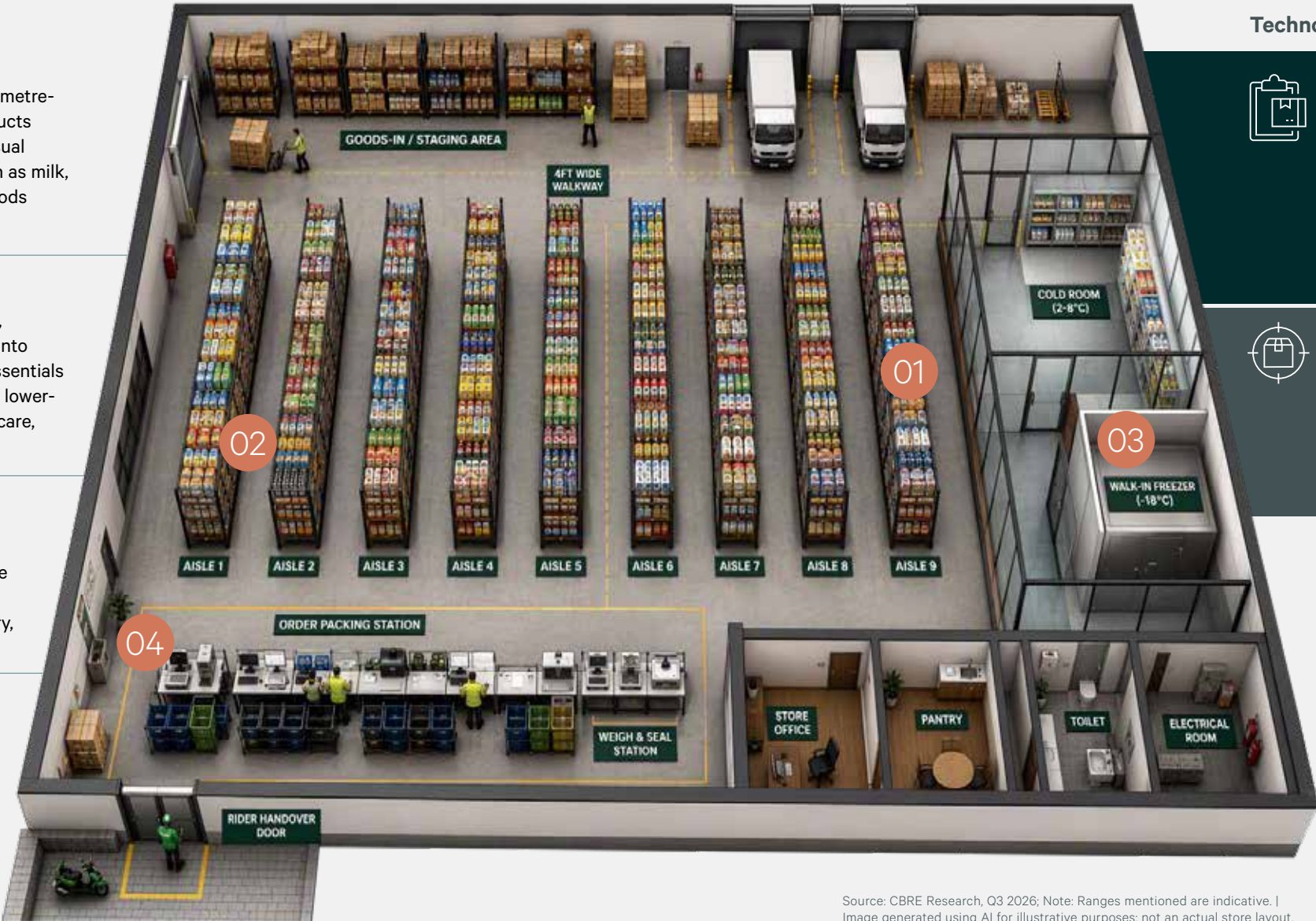
A typical dark store is a compact, closed-to-the-public micro-warehouse engineered for efficient online order fulfilment. Its key functional sections include:

01 Storage racks and aisles
Around 55-60% of space is allocated to narrow, 1-metre-wide aisles with high-density steel shelving. Products are arranged by picking frequency rather than visual merchandising, with high-demand essentials such as milk, vegetables, bread, beverages and ready-to-eat foods placed at eye level near packing stations.

02 High-demand SKUs
A typical dark store stocks 3,000-5,000 products, tailored to local pin-code demand and organised into velocity-based zones. Zone A houses everyday essentials and fast-moving items, while Zones B and C carry lower-velocity categories such as bulk FMCG, personal care, niche products and small appliances.

03 Temperature-controlled storage
Commercial walk-in chillers, deep freezers and crates for fresh fruits and vegetables help manage temperature-sensitive categories. Dedicated cold rooms and freezers maintain the freshness of dairy, meat, produce and frozen goods.

04 Order-packing station
Located closest to the exit, this area includes counters equipped with barcode label printers, polybag sealing machines and order aggregation screens. Orders are picked, scanned, packed and staged at a dedicated dispatch area, while riders collect pre-packed orders from a pickup window without entering the warehouse.



Technology driving inventory operations

Real-time inventory tracking, barcode scanning, and digital pick lists enable order processing within minutes. Automated rolling inventory audits allow select aisles to be reconciled without interrupting operations.

Warehouse Management Systems (WMS) continuously optimise layouts, especially during festivals, by positioning seasonal high-demand products closer to packing areas.

The layout separates replenishment and delivery flows: stock enters through a goods-in bay, while riders exit through a dedicated handover door. This allows stores to receive stock even during peak delivery periods. For landlords, floor area is rarely the only constraint. Ground-floor access, power supply for cold storage and loading points separate from rider movement are critical. A unit that meets the area requirement on paper may still need retrofits before it is operationally viable.

Source: CBRE Research, Q3 2026; Note: Ranges mentioned are indicative. | Image generated using AI for illustrative purposes; not an actual store layout.

India’s Dark-store Network Scales Up

India’s q-commerce ecosystem has scaled to ~7,800¹ dark stores nationally, driven by convenience-led consumption and continued platform expansion across cities. The network remains metro-centric, with 65-70% of stores concentrated in the top eight cities, even as expansion into tier-II and tier-III markets accelerates. Across 100+ cities, these facilities now occupy roughly 27 million sq. ft.¹ Sustained investment in dark-store density and AI-driven logistics signals the sector’s move from early-stage growth to an established digital retail channel.

Table 2.1: Key players in India’s q-commerce space*

Key players	Founded/ q-commerce launch year	Approx. no. of dark stores (as of June 2026)
Zepto	2021	1,200
Blinkit**	2013	2,400
bigbasket**	2011	900
Instamart	2020	1,200
JioMart	2020	600
Flipkart Minutes	2024	1,000
Amazon Now	2025	500
Total		7,800

Source: 1. CBRE Research, Q3 2026; 2. Publicly available information, 2025 | Note: *Players are listed for illustrative purposes only and do not indicate any ranking, preference, or performance assessment. | ** Some entries reflect company founding; others reflect q-commerce launch. Blinkit pivoted to q-commerce in 2021 (founded as Grofers, 2013). Bigbasket expanded into q-commerce after being founded in 2011 as an e-grocery platform.

Capital commitments deepen network capacity

Capital commitments are running in parallel across real estate and technology. Instamart leads on physical expansion, with INR 44.75 billion allocated to dark stores and warehouse networks to broaden hyperlocal coverage. Amazon India is directing INR 28 billion towards doubling its quick-commerce vertical and strengthening its pan-India fulfilment backbone, including warehouses and delivery stations. Zepto has committed INR 13.25 billion through 2030 to core technology and cloud infrastructure. These commitments point to a dual focus on asset expansion and back-end capability.²





“The dark-store network remains metro-centric, with 65-70% of stores concentrated in the top eight cities, even as expansion into tier-II and tier-III markets accelerates”

Building the Backbone: Q-commerce Warehousing Network Build-out

While q-commerce players are often associated with dense inner-city dark stores, they also lease warehouses on city outskirts to support replenishment and hold wider SKU* volumes. These facilities operate as mother hubs, supplying inventory to multiple dark stores within the city through a hub-and-spoke model. Between 2021 and 2025, q-commerce related warehousing demand grew at a CAGR of 81%. After aggressive expansion in 2024–25, e-commerce players have entered a cautious phase of their expansion cycle, prioritizing optimization and higher utilization of existing space. Quick commerce likewise entered an operational reset in H1 2026, recording 0.7 million sq. ft. of take-up as players shifted focus to unit economics and dark store optimization.

Figure 2.1: Q-commerce space take-up in India (2021-H1 2026)

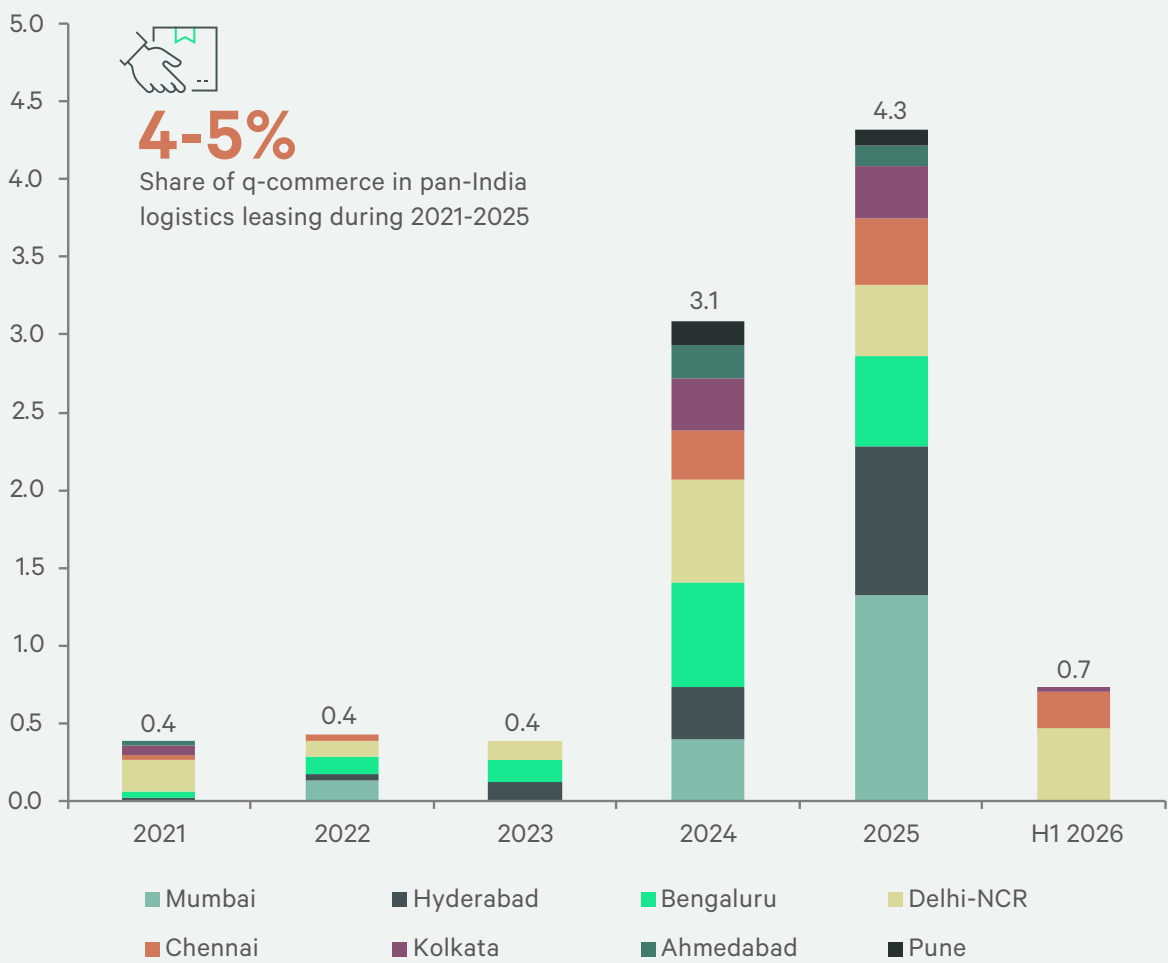


Figure 2.2: Share of q-commerce leasing across key cities (2021-H1 2026)

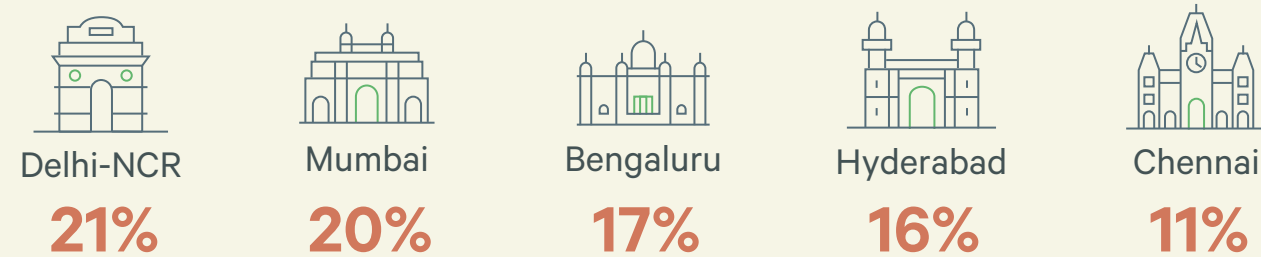
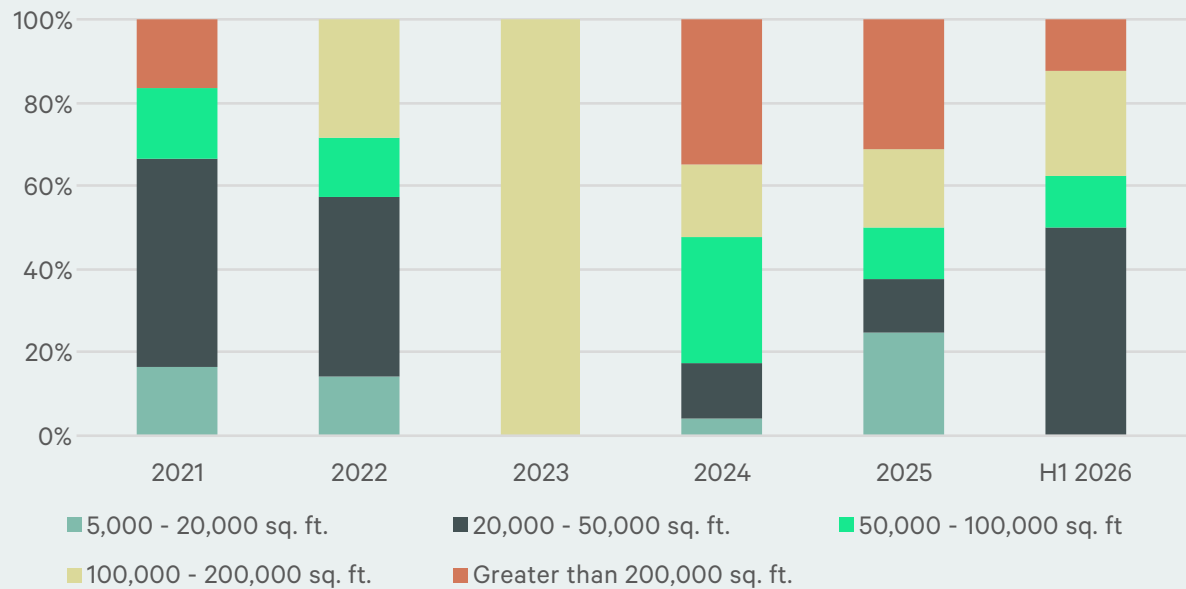


Figure 2.3: Q-commerce deals by size bracket (2021-H1 2026)



Source: CBRE Research, Q3 2026 | Note: Q-commerce entities considered for this analysis comprise Blinkit, Swiggy Instamart and Zepto | *SKU=Stock Keeping Unit



03 | Investment Trends

Investor Lens: Entity Structure and FDI Treatment in Q-commerce



The Interface

The Consumer-facing Marketplace
Tech Platform

FDI Status
100% FDI allowed under the automatic route

Role
This entity is responsible for ownership of the smartphone application, branding, and software, as well as management of the last-mile delivery fleet. It functions solely as an aggregator or service provider.



The Inventory Owner

The Front-end Retail Seller

FDI Status
The entity must be majority-owned by Indian promoters or domestic entities, with foreign ownership not exceeding 50%

Role
This entity is responsible for leasing the physical dark store, employing warehouse staff, and maintaining ownership of the inventory. Where the q-commerce operator is majority foreign-owned, owning inventory is prohibited, hence sales and invoice generation happens via an independent third-party seller or direct-to-consumer (D2C) vendor. In contrast, a majority domestically owned q-commerce operator may own the inventory directly.



The Bulk Purchaser

The Wholesale Entity (B2B arm)

FDI Status
100% automatic FDI allowed in cash-and-carry operations

Role
This entity utilises bulk purchasing power to acquire goods directly from major FMCG companies, such as Unilever and ITC, at significant discounts. These goods are subsequently sold to third-party vendors, who then supply them to end users through the q-commerce application. As 100% FDI is permitted, foreign capital may be employed at this stage for inventory procurement.

What does it mean?

Domestic entity
May participate across the entire value chain, including ownership of the front-end application, bulk inventory procurement, and direct sales to end users through the q-commerce application.

Majority foreign-owned entity
May own the quick commerce application and purchase bulk inventory from FMCG companies. However, this inventory must be sold to third-party or independent vendors, who may then list their products on the q-commerce platform. To mitigate concentration risk, restrictions apply to both the sourcing of goods from a single vendor and the proportion of sales generated by any single vendor on the platform*.

*Independent third-party sellers operating dark stores cannot source more than 25% of their total inventory from a foreign-owned entity or its wholesale group companies. In addition, no single seller (or group of sellers under common ownership) may account for more than 25% of the total sales value transacted on a foreign-owned q-commerce platform during a financial year.



Investment Inflows Support Network Expansion

Over the last decade, Indian q-commerce operators have attracted USD 8.94 billion in cumulative funding, second only to the United States (USD 10 billion) and ahead of Germany (USD 4.28 billion)¹. These inflows have funded geographic expansion, dark-store scale-up and diversification into higher-margin categories such as beauty, electronics and apparel.

Investment strategies adopted by q-commerce players



Institutional fundraising

Institutional investors such as SoftBank, Temasek and Qatar Investment Authority, along with VC firms including Bain Capital Ventures, Lightspeed India, Stellaris Venture Partners and Elevation Capital, have deployed capital into the sector.² The investor base has also widened to include large pension funds, with CalPERS’ participation in Zepto’s USD 450 million funding round in 2025.



Mergers and acquisitions

Large retail players and conglomerates have acquired stakes to diversify their offerings or enter the segment for the first time.



Stock exchange listings

No q-commerce platform is currently listed as an independent entity. Public-market presence falls into two categories: platforms under publicly traded parents with a broader portfolio (Figure 3.2), and platforms held within one subsidiary or business arm of a larger group (Figure 3.3).



IPOs

Zepto and bigbasket are among the operators preparing for public-market debuts. These could become the first standalone IPOs in India’s q-commerce sector.³

Figure 3.1: Key investments raised by q-commerce players²

Operator	Funds raised (USD million)	Year	Key investors
Zepto	350	2024	Mankind Pharma, RP Sanjiv Goenka Group, Haldiram Snacks Family Office, Cello Family Office
Zepto	450	2025	California Public Employees' Retirement System, General Catalyst, Goodwater Capital, Lightspeed India
Instamart (Swiggy)	1,200	2025	ICICI Prudential, SBI Mutual Fund, Aditya Birla Sun Life, Temasek, Norway’s global pension fund, Vanguard, Capital Group, Nomura, and Goldman Sachs
bigbasket	22.7	2025	DBS Bank

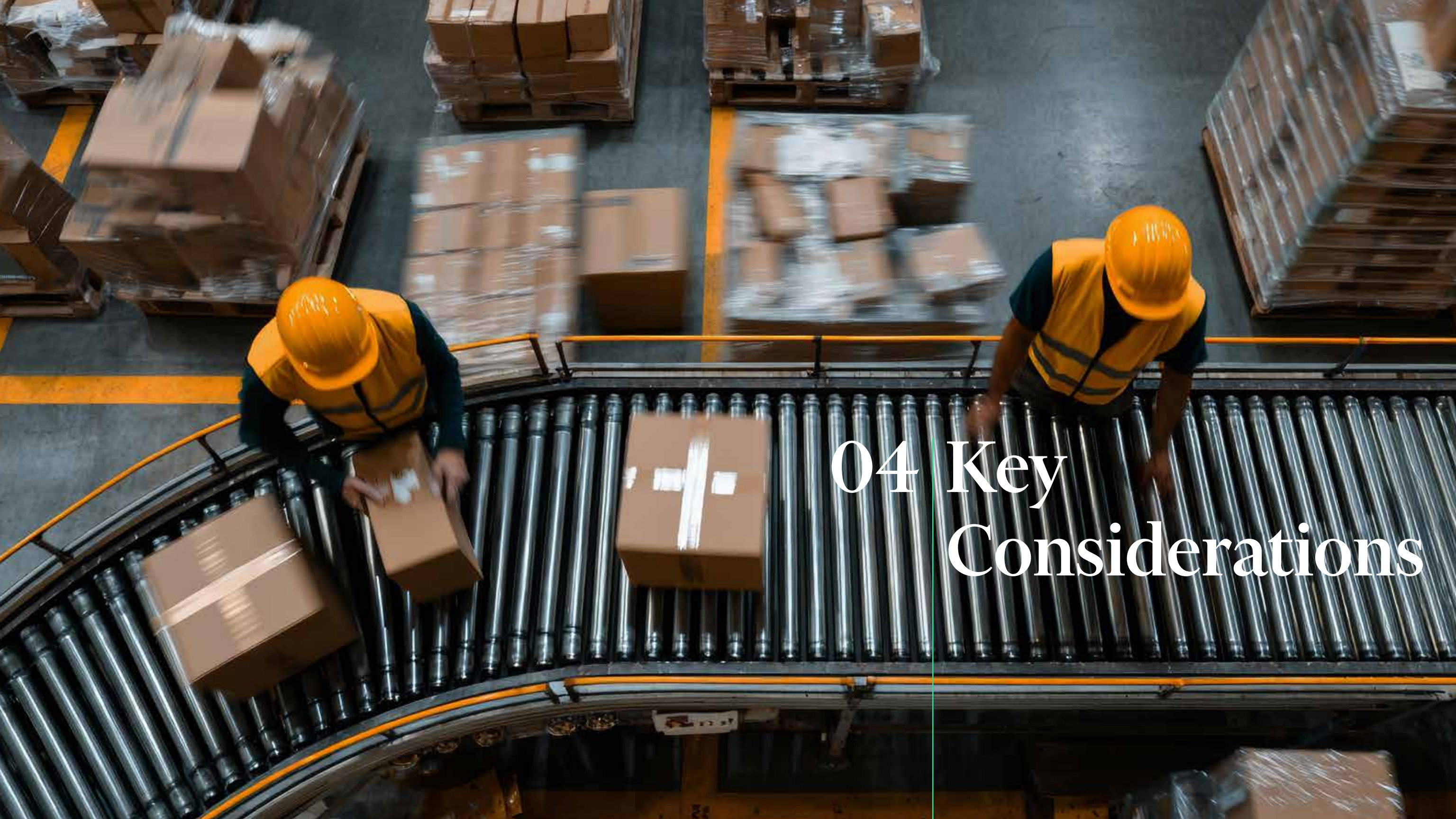
Figure 3.2: Operators listed through parent companies²

Operator	Parent	Listing year	Key investors
Blinkit	Eternal	2021	Zomato, Info Edge
Instamart	Swiggy	2024	SoftBank, Prosus, Accel

Figure 3.3: Operators housed within larger ecosystems²

Operator	Parent	Group	Key investors
bigbasket	Tata Digital	Tata Group	Tata Digital, Alibaba (early)
JioMart	Reliance Retail	Reliance Industries	Reliance Industries

Note: Tracxn's quick commerce classification spans food-delivery and grocery-marketplace operators
Source: 1. Quick Commerce Sector, Tracxn, August 2026; 2. Publicly available information, October 2025; 3. Publicly available information, August 2026; CBRE Research, Q3 2026 | Note: *CalPERS refers to the California Public Employees' Retirement System



04 Key Considerations



Key Considerations Facing Operators

 Operating model • Initial capex: Heavy initial investments and fixed costs can pressure margins. • Speed-led execution: Short delivery windows require investment into accurate demand planning, stock availability, routing and staffing. • Cost build-up: Fuel, supply chain costs and high-rent dark-store locations can increase logistics spend. • Returns/spoilage : Rushed packing, incorrect items, high spoilage for fresh produce can increase returns/refunds. • Retention spend: Offers, cashbacks and loyalty spends can add to operating costs.	 Expansion pathway • Density gap: Lower density and preference for local retailers can make tier-II / III expansion harder. • Category concentration: Grocery-led baskets face thin margins and strong neighbourhood-store competition. • Attrition: 31% of quick-commerce employers identify attrition among gig and delivery workers as their biggest workforce challenge, highlighting the sector's dependence on a highly mobile workforce and frequent platform switching. • Unit economics: Low order values can keep delivery costs above revenue per order.	 Regulatory environment • FDI restrictions: Inventory-led e-commerce models remain restricted under Indian FDI regulations. • Anti-competitive practices: Discounting, below-cost selling and preferential listings remain under regulatory watch. • Food safety: Hygiene, cold chain and near-expiry tracking require Food Safety and Standards Authority of India (FSSAI) compliance. • Labour norms: Worker safety, fair wages and benefits remain important for time-bound delivery models.	 Environmental and social considerations • Carbon emissions: Fragmented deliveries may add to CO₂ emissions and air pollution. • Packaging waste: Single-use and item-level packaging can increase waste generation. • Traffic congestion: Higher two-wheeler volumes may add to congestion in dense urban areas. • Rider welfare: Short delivery timelines can raise concerns around safety, stress, insurance and accident risk.	 Real estate considerations • Quality-space gap: High city rents, inadequate floor plates and zoning limits could constrain scalable dark-store supply. • Developer caution: Small asset sizes, complex urban locations and weaker economics can limit participation by large developers, warehouse operators and 3PLs. • Not purpose-built: Most dark-store networks today rely on repurposed retail or commercial spaces rather than facilities designed for dark-store operations. This can result in upfront capex for non-compliant spaces and heavy retrofitting.
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Source: CBRE Research, Q3 2026



05 | The Way Forward

India's Dark-store Network Set to Surpass 12,000-mark by 2030

After a phase of capital-heavy expansion, India's q-commerce sector is entering a more disciplined growth cycle, backed by category diversification, non-metro penetration, and emerging high-margin revenue streams. Leading platforms are also moving closer to contribution-margin breakeven, signalling a stronger focus on sustainable scale.

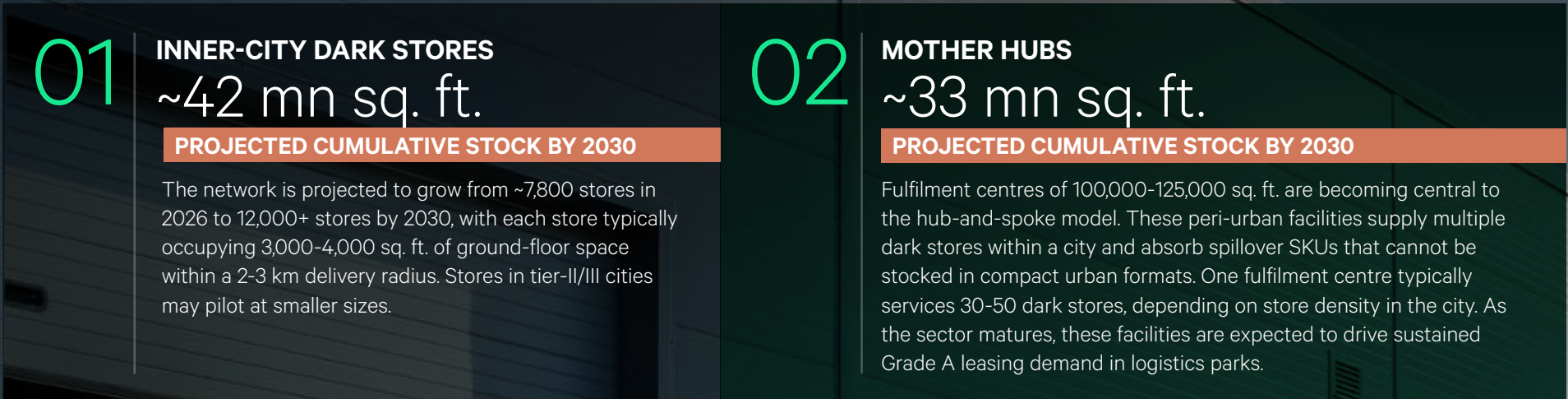
Figure 5.1: Two growth vectors through 2030

01 GEOGRAPHIC EXPANSION: FROM METROS TO TIER-II/III CITIES
Approximately 65-70% of all dark stores are currently located in the top eight metros, with operators now deepening presence in markets such as Jaipur, Lucknow, Surat, Coimbatore and Nagpur, where rising internet adoption is lifting order volumes. Cost-effective real estate and lower overall overhead costs, make tier-II/III cities attractive for Q-com players.

02 MONETISATION MATURITY: FROM DELIVERY FEES TO MULTI-LAYER REVENUE
Retail media, private labels, and subscriptions
Advertising is emerging as a high-margin revenue stream, with brands and D2C players paying for sponsored placements and sampling through q-commerce platforms. Along with private labels and subscriptions, this is improving unit economics beyond delivery fees and average order value growth.

Source: CBRE Research, Q3 2026

Figure 5.2: Two real estate layers expected to expand through 2030



“Capital discipline, tier-II economics and dark-store density are expected to drive an estimated ~75 million sq. ft. of cumulative urban logistics requirement, with mother hubs anchoring sustained Grade A leasing demand”



Partner-led Models Expected to Drive the Next Phase

The expansion of q-commerce is anticipated to serve as a significant driver of in-city warehousing demand during the latter half of the decade. As market participants transition from growth-oriented strategies to capital-efficient expansion, the manner in which this demand is addressed in the market is projected to evolve, with a greater emphasis on franchised, outsourced, and shared arrangements rather than platform-owned networks. Four primary models are anticipated to shape leasing patterns through 2030.



FRANCHISE MODELS

Franchise-led dark-store models may emerge as a route to rapid penetration into tier-II and tier-III markets while reducing network expansion costs. Under this arrangement, local owners provide space, while the platform supplies inventory, technology and branding.



SHARED INFRASTRUCTURE

- As tier-I real estate costs rise, multiple operators and brands are expected to share fulfilment infrastructure within a single facility or logistics hub.
- Such a model would improve space utilisation and unit economics, and could lower the order-density threshold at which a new location becomes viable.



3PL OUTSOURCING

As platforms scale beyond the major metros and prioritise profitability, they are expected to increasingly outsource warehousing, dark-store management, fulfilment and last-mile delivery to specialised third-party logistics providers. This would allow operators to concentrate on customer acquisition, technology and inventory optimisation while drawing on the operational depth of logistics partners.



MOM-AND-POP/KIRANA PARTNERSHIPS

Operators are expected to use existing neighbourhood kirana stores as micro-warehouses, fulfilling orders through their own apps and delivery fleets. This model combines the proximity and inventory of kiranas with the speed, visibility and convenience of modern q-commerce platforms.

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