The Festive Commerce Playbook: 12 Trends Driving E-commerce Growth

NielsenIQ

What is really driving this growth?

E-commerce in India is scaling rapidly — with festive as the key demand inflection

1

Is E-comm growth festive-led or structural?

2

Growth driver: more shoppers or higher spend?

3

Which categories drive spikes vs steady demand?

4

How is E-comm vs Offline evolving?

5

Are Tier 2 markets becoming metro-like?

Context-

- Expanding beyond metros at scale
- Consumer adoption moving from trial to mainstream
- Festive remains the biggest demand trigger

EMS | Digital Purchases

#1 The 3 levers fueling E-commerce growth: More Shoppers, Bigger Baskets (Units), More Repeat purchase (Orders)

Value indexed (YEC 2024 = 100) – E-comm : All India Urban

	Value	Quantity purchased (Units)	No. of transactions (Orders)	Shopper Penetration
E-commerce	102	118	111	107
FMCG & Beauty	116	121	120	114

*Value indexed to 2024 – E-comm : All India Urban
*All Products = Mobiles, Electronics, Fashion, FMCG, Beauty, Home & Kitchen, etc.

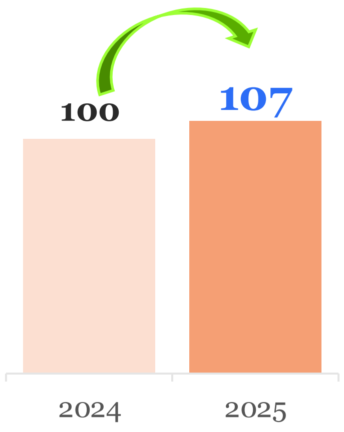
Does not include Blinkit, Zepto, Meesho & any other platforms that do not share E-mail receipts

#2 FMCG & Beauty Drive Habit-Led Growth -More Shoppers (~80%), Buying more (Higher Spend & Units), More Often (Higher Frequency).

1

Shopper penetration

*Value indexed to 2024

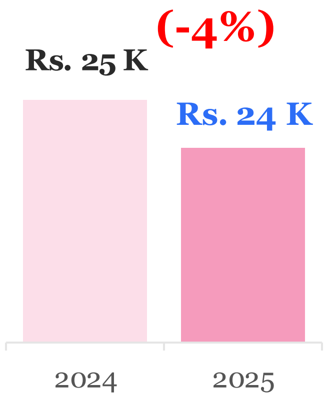


2

Shopper Behavior

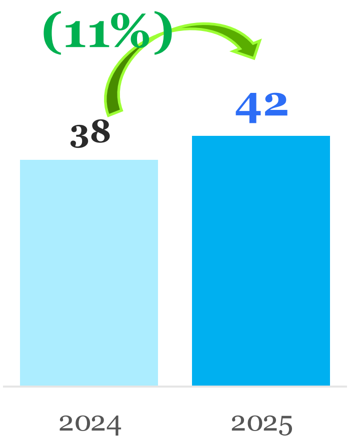
Averages Spends per Shopper

*Absolutes



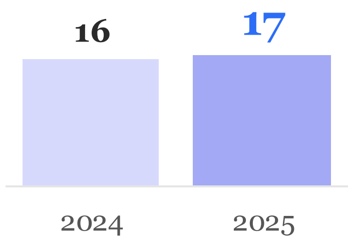
Units purchased per Shopper

*Absolutes



Frequency of Purchase

*Absolutes



All Ecommerce

*All Products = Mobiles, Electronics, Fashion, FMCG, Beauty, Home & Kitchen, etc.

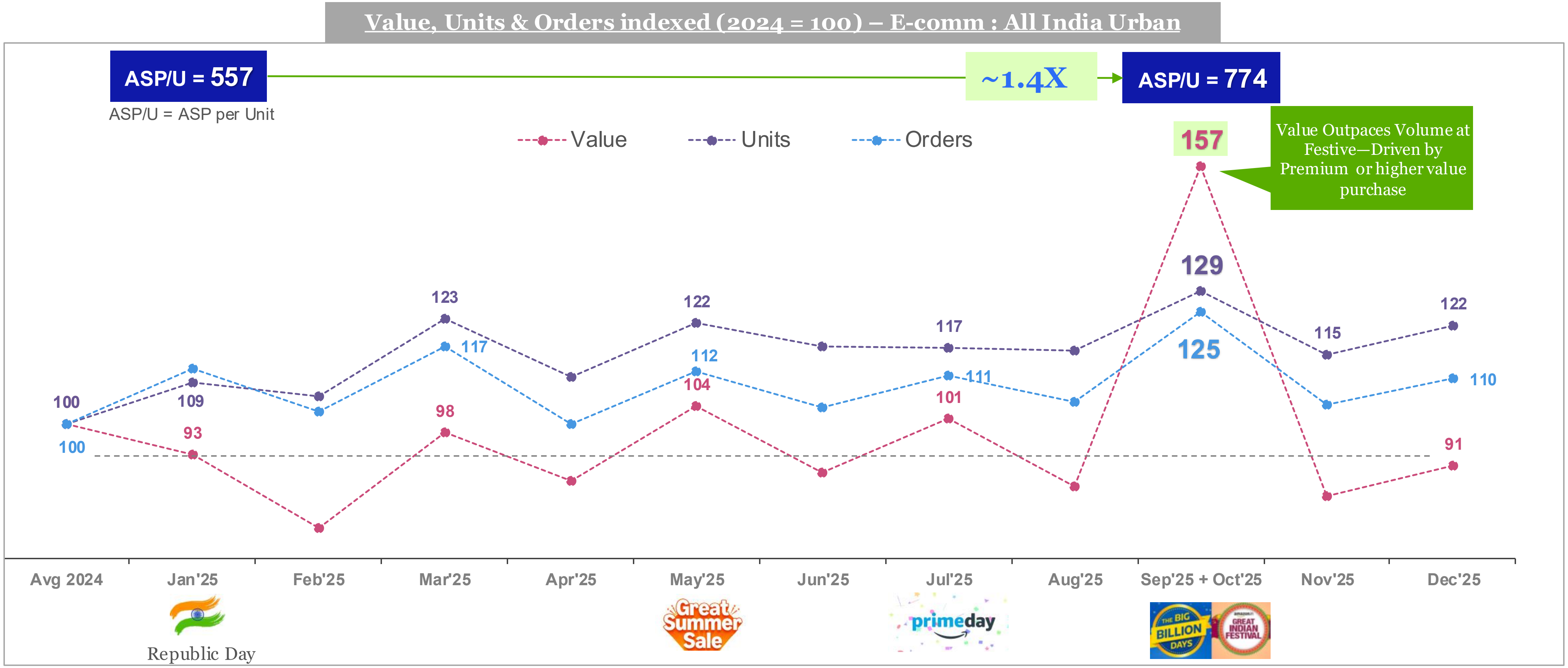
	Shopper penetration	Averages Spends per Shopper	Units purchased per Shopper	Frequency of Purchase
FMCG & Beauty	79%	Rs. 5.5 K (9%)	35 (13%)	9 (13%)
Electronics & Accessories	48%	Rs. 11 K (-8%)	4	3

E-comm : All India Urban

Source: NIQ Digital Purchases – 350K online shopper panel

Does not include Blinkit, Zepto, Meesho & any other platforms that do not share E-mail receipts

#3 Diwali festive growth is value-led (1.6X)— unlocks the biggest value opportunity in E-comm

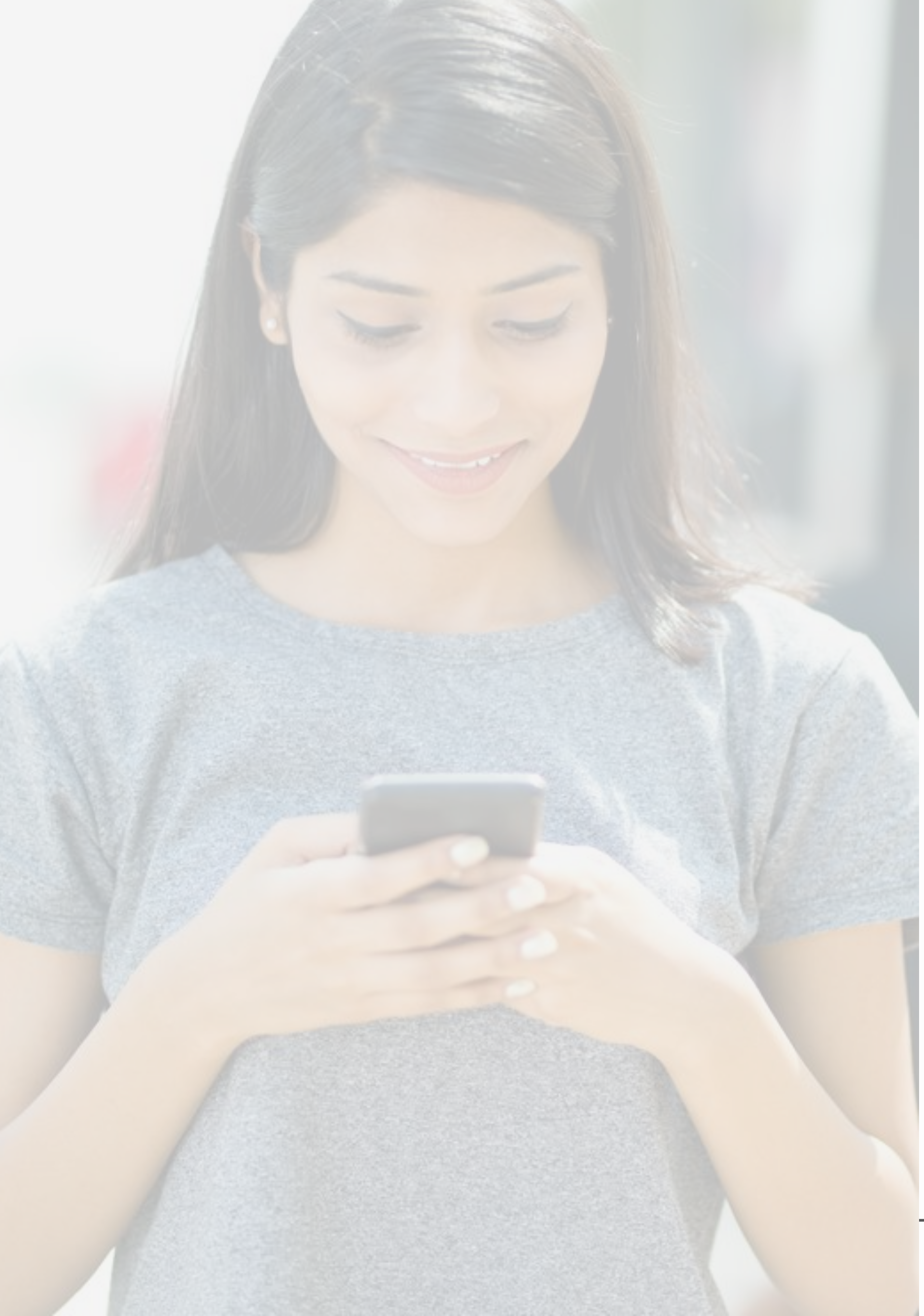


E-comm : All India Urban

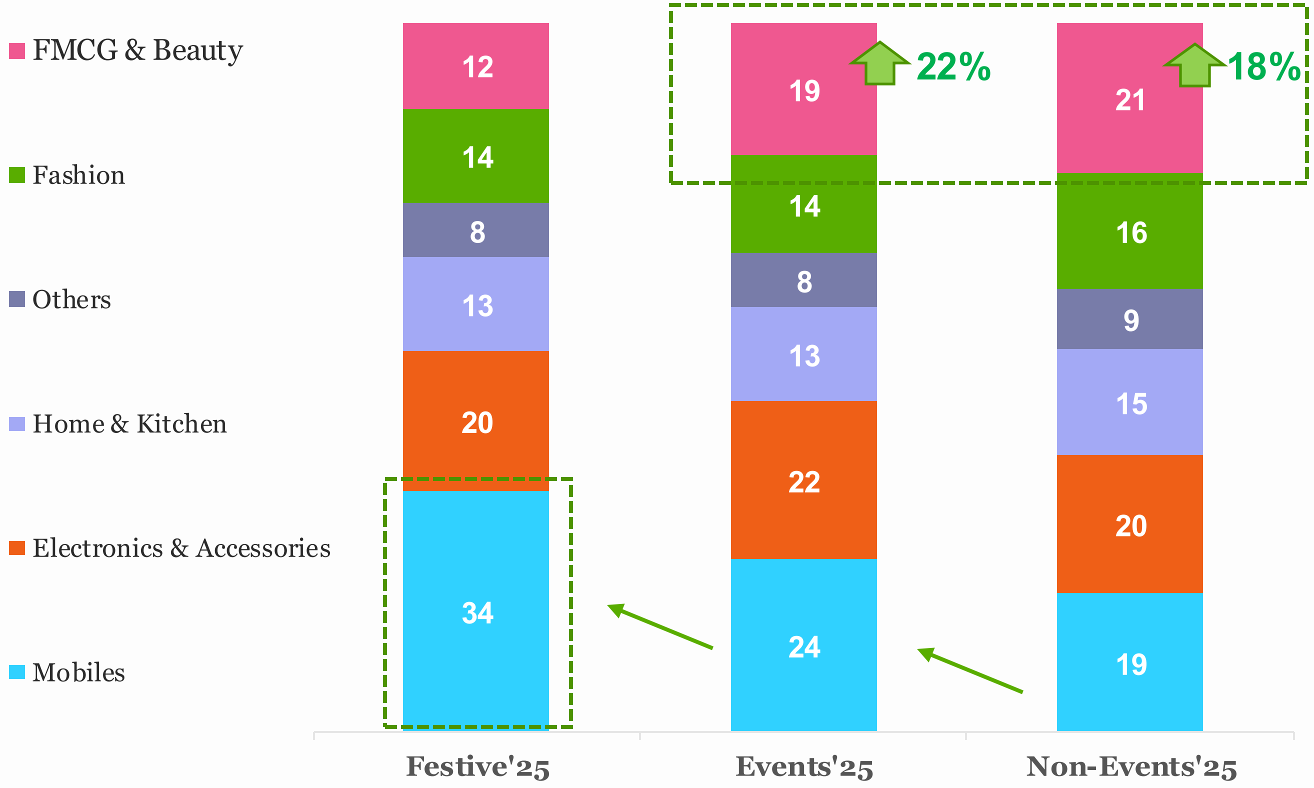
*All Products = Mobiles, Electronics, Fashion, FMCG, Beauty, Home & Kitchen, etc.

* Does not include Blinkit, Zepto, Meesho & any other platforms that do not share E-mail receipts

#4 Mobiles drive festive spikes; FMCG & Beauty fuels year-round demand



Value Contribution% by Category in E-comm : All India Urban



*Value indexed to 2024 – E-comm : All India Urban

*All Products = Mobiles, Electronics, Fashion, FMCG, Beauty, Home & Kitchen, etc.
Other = Books, Toys, Medical equipment, Musical instruments, Stationaries, etc

Festive = Sep+Oct

Events = Jan+May+Jul

Non-Events = Rest of the months

#4 Forever vs. Flash : Drive FMCG & Beauty Beyond Festives; Treat Mobile as Event-Led

Value indexed (YEC 2024 = 100) – E-comm : All India Urban

FMCG+Beauty	Jan'25	Festive'25	Dec'25
Value	108	117	122
Units	118	119	119
Orders	119	123	120

Year-round

FMCG+Beauty growth continues beyond festive (Dec'25), while Mobile growth is largely festive-led.

Mobiles	Jan'25	Festive'25	Dec'25
Value	90	203	54
Units	84	143	46
Orders	85	154	50

Festive

*Value indexed to 2024 – E-comm : All India Urban

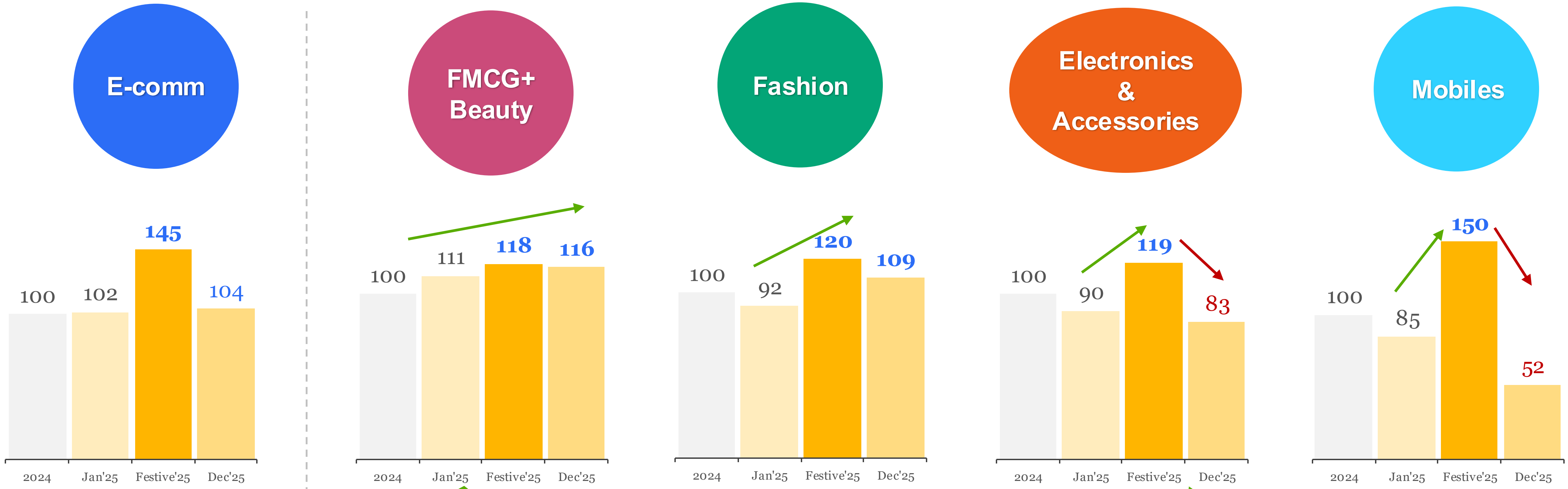
Festive = Sep+Oct

#5 FMCG+Beauty shoppers are habit builders, while Electronics and Mobiles are festive hunters

Shopper penetration

Shopper Penetration by Category (Value indexed to YEC 2024 = 100)

E-comm : All India Urban



Penetration increases even after festive indicating habit led shopper for FMCG + Beauty

Penetration peaks the highest ding Festive as shoppers wait for festive deals to buy online

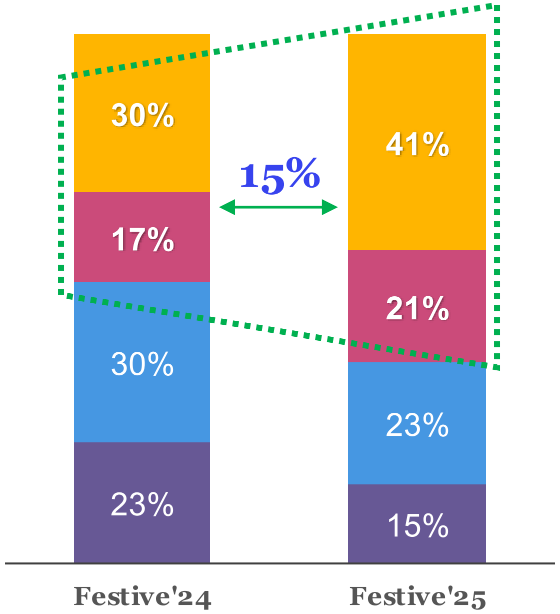
*Value indexed to 2024 – E-comm : All India Urban

*All Products = Mobiles, Electronics, Fashion, FMCG, Beauty, Home & Kitchen, etc.

#6 Premium Mobiles breaks Metro boundaries, scale into Rest of Metros and Tier 2

Mobiles

Mobile Value Contribution% by Town Class in Festive'25 – E-comm



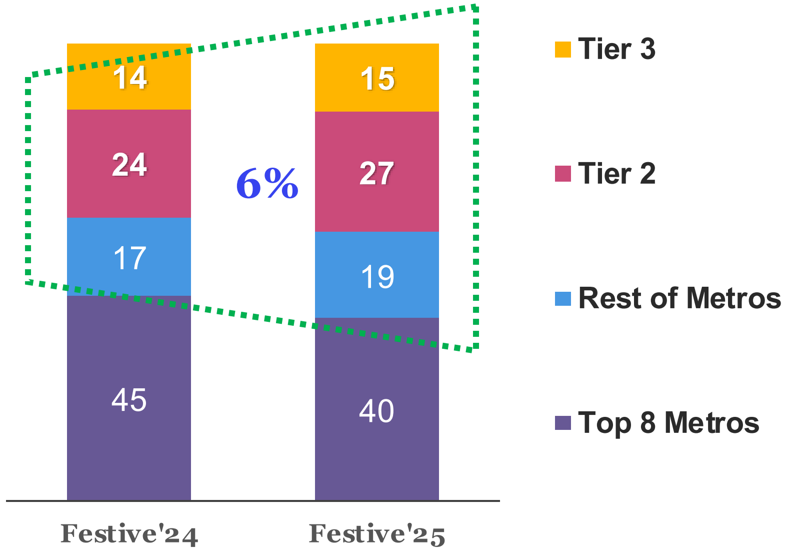
*Value indexed to 2024 – E-comm : All India Urban
*ASP in '000 (Average Selling Price/ Units)
Festive = Sep+Oct

#7 FMCG Growth Shifts Beyond Metros—Lower Tiers Strengthen Spend and Share

FMCG+ Beauty

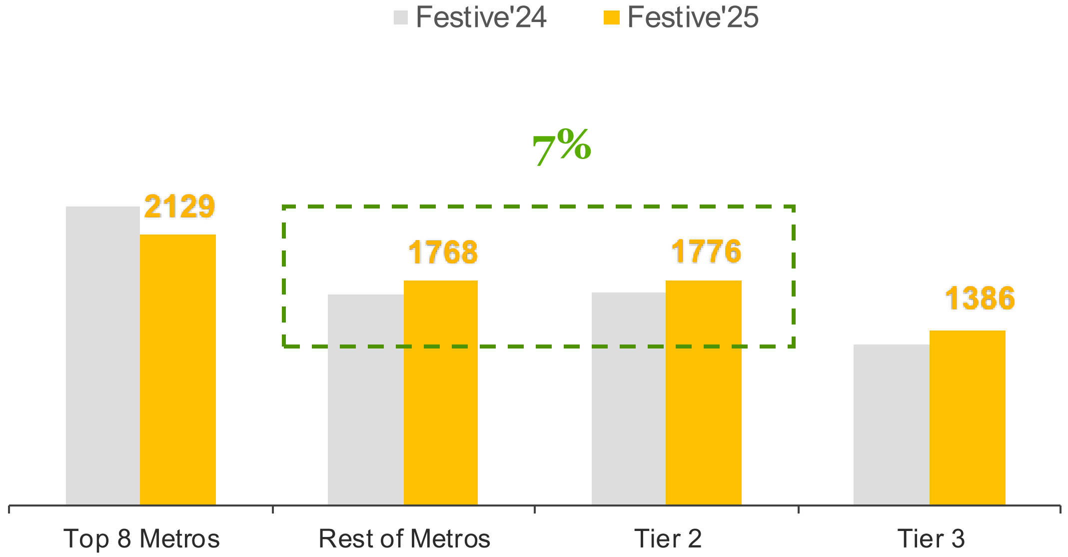
FMCG & Beauty Value Contribution% & ASPS by Town Class – E-comm

Value Contribution %



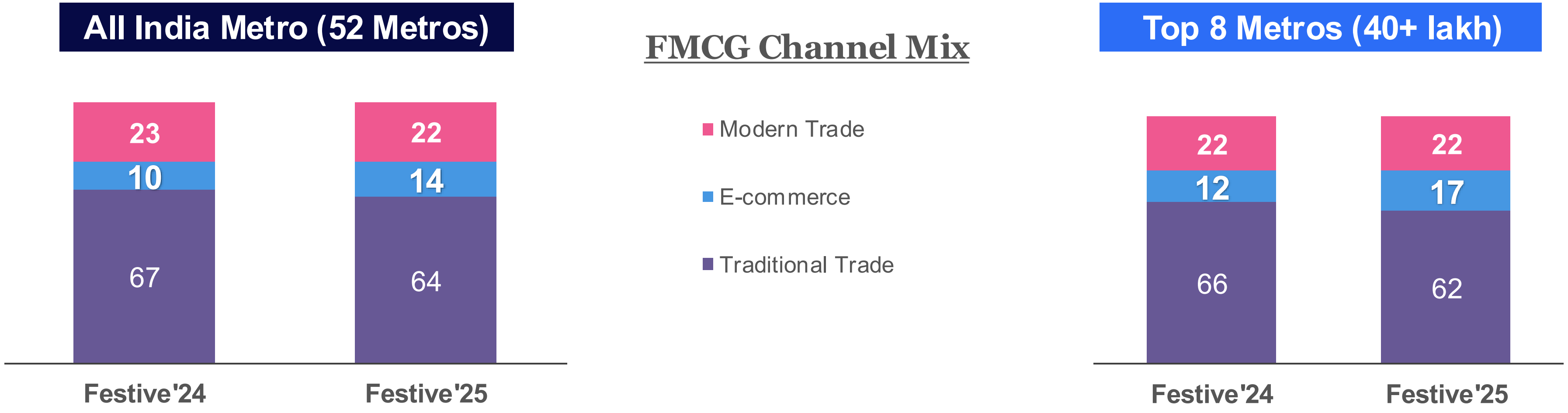
ASPS & Growth% YA

Average Spends of an FMCG Shopper



Festive = Sep+Oct

#8 E-commerce growth breaks festive dependency; Modern Trade still tied to festivals



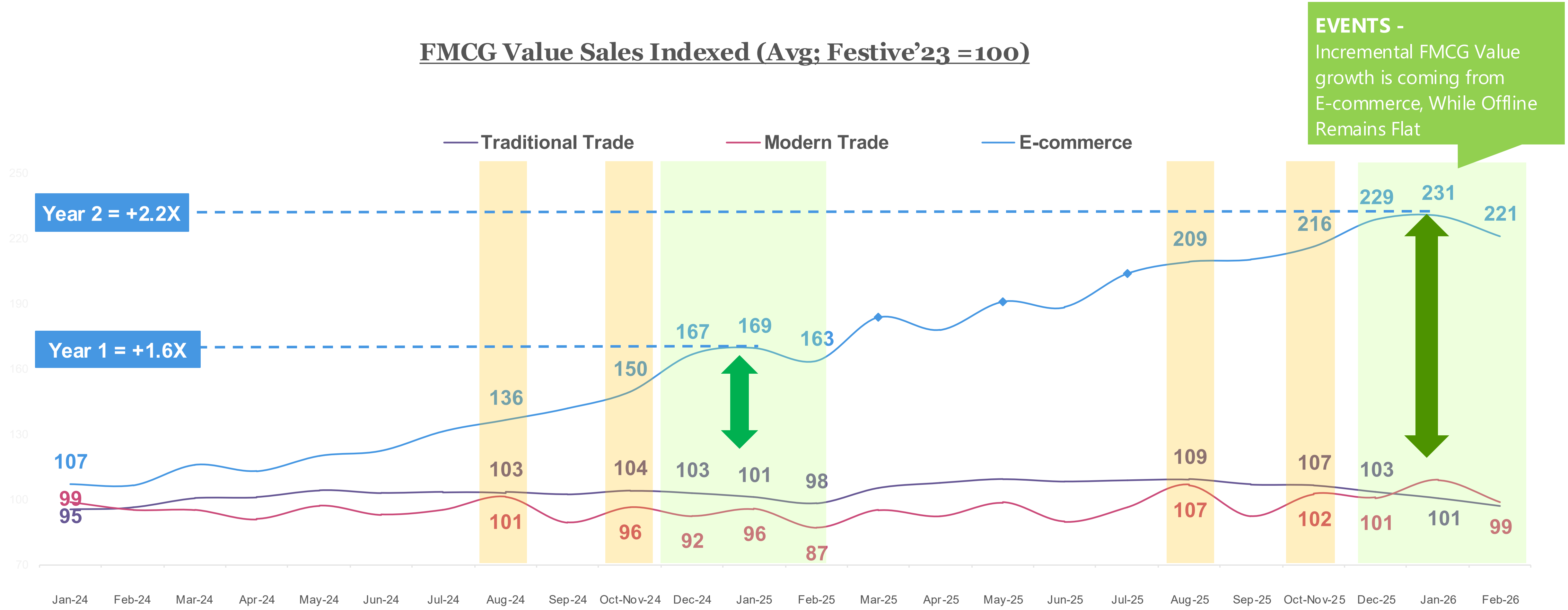
%Growth YA	TT	MT	E-comm
Festive'25	3.5	5.9	47.4
2025	4.0	1.5	51.2

%Growth YA	TT	MT	E-comm
Festive'25	-0.4	4.2	40.7
2025	-0.6	-1.8	45.2

Festive = Aug+Oct+Nov

#9 Online FMCG growth now extends beyond festivals, driven by events

E-comm Measurement Services



E-comm : All India Metros

Festive = Aug+Oct+Nov

Events = Jan +Feb+Dec

Non-Festive = Remaining

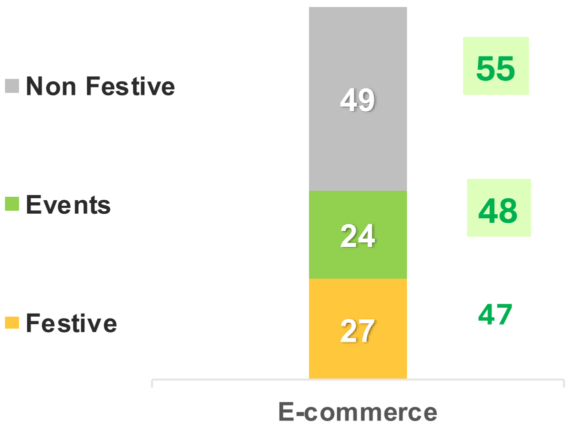
Ecomm +2.2X

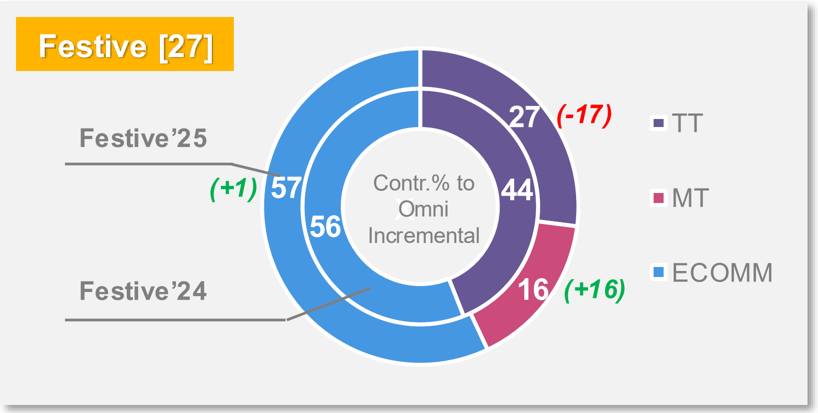
MT 0.99X

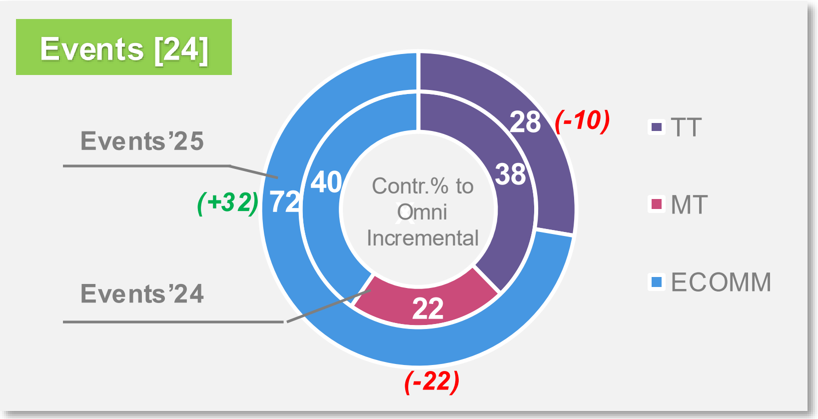
TT 0.98X

#10 Events steal the spotlight online (~75% incremental), while Festive momentum holds steady

FMCG Value %Contribution in 2025 and %Growth vs YA







Festive = Aug+Oct+Nov

Events = Jan +Feb+Dec

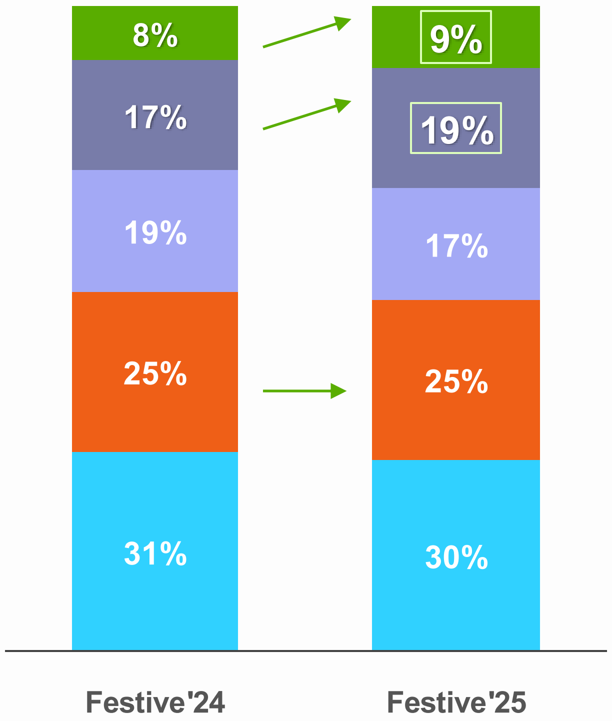
Non-Festive = Remaining

E-comm : All India Metros

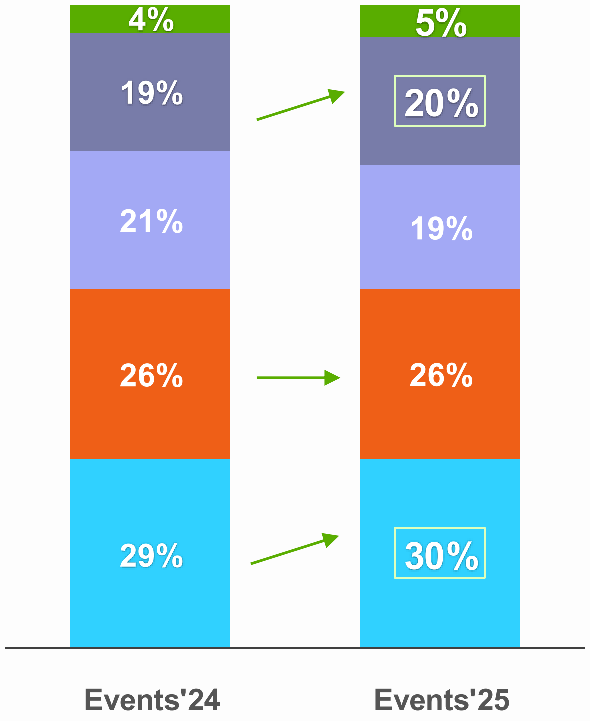
#11 Impulse category remain structurally strong across festive and event periods

Online Snacking

Festive Categories Value Contri.%



INDIAN SWEETS
CHOCOLATE
BISCUITS
SALTY SNACKS
SOFT DRINKS



E-comm : All India Metros

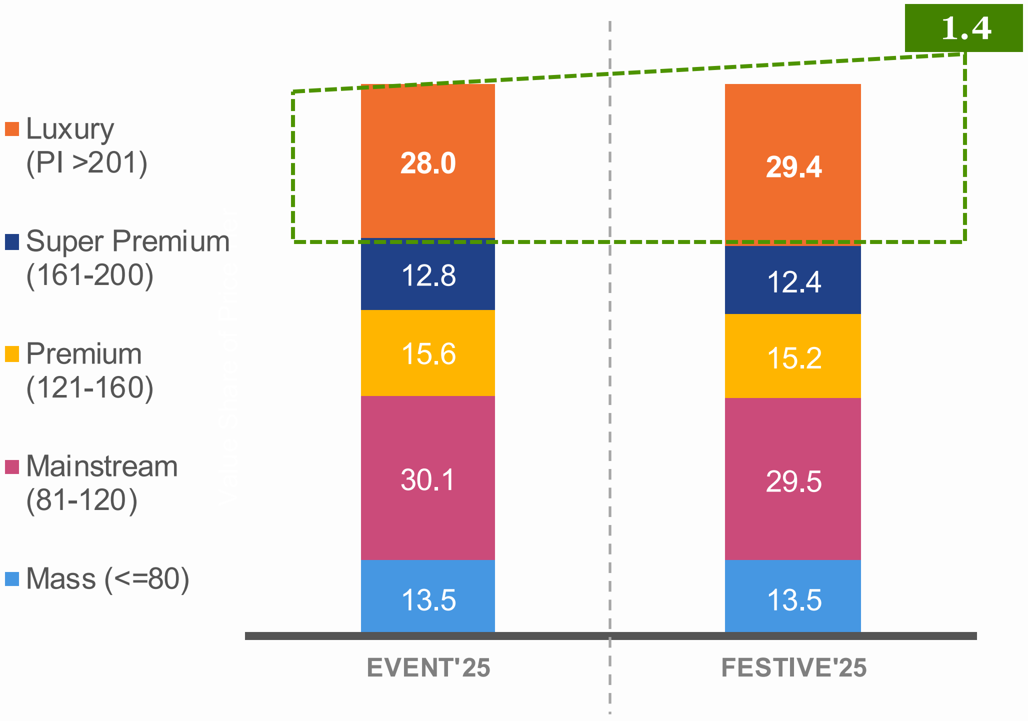
Festive = Aug+Oct+Nov

Events = Jan +Feb+Dec

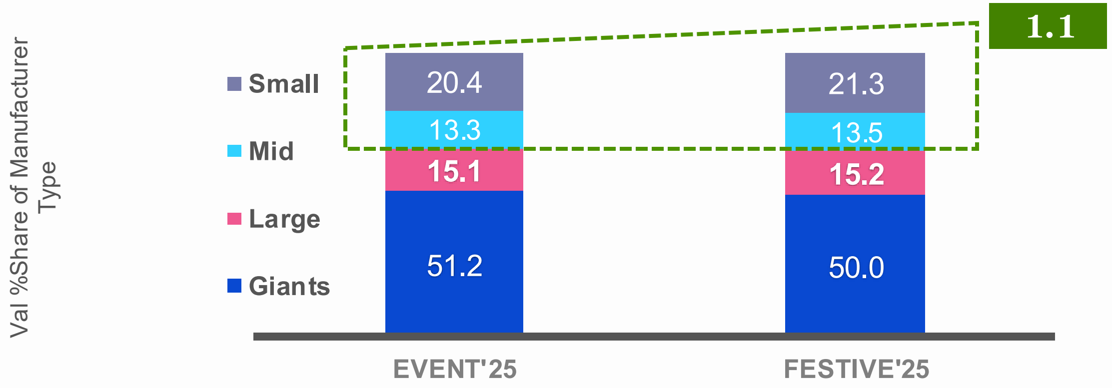
Source: NIQ RMS & EMS data

#12 Bigger Festive drive Luxury spends led by Small manufacturers

FMCG – Ecomm : Price Tier



Value %Contribution of Manufacturer



LUXURY

Value %Contri.	EVENTS'25	FESTIVE'25
SMALL	34.3	35.5
MID	16.0	15.3
LARGE	19.7	19.2
GIANTS	30.0	30.1

1.2

E-comm : All India Metros

Mass (PI<=80)	Mainstream (81-120)	Premium (121-160)	Super Premium (161-200)	Luxury (PI >201)

Festive = Aug+Oct+Nov

Events = Jan +Feb+Dec

NIQ

Thank You

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