

Turning up the *Volumes* *Online*



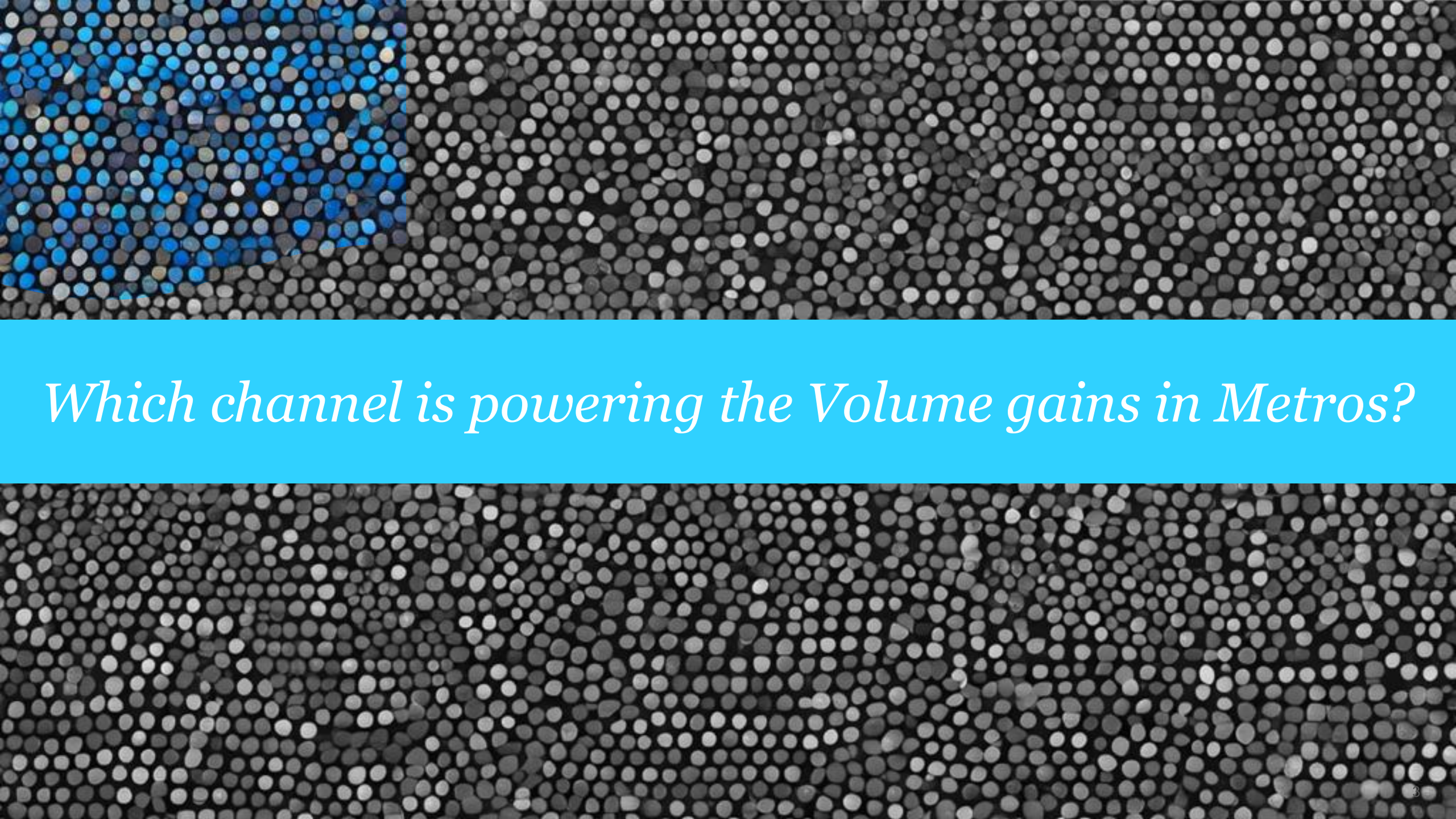


*Which channel is
powering the
Volume gains in
Metros?*

*Where is Volume
growth coming
from?*

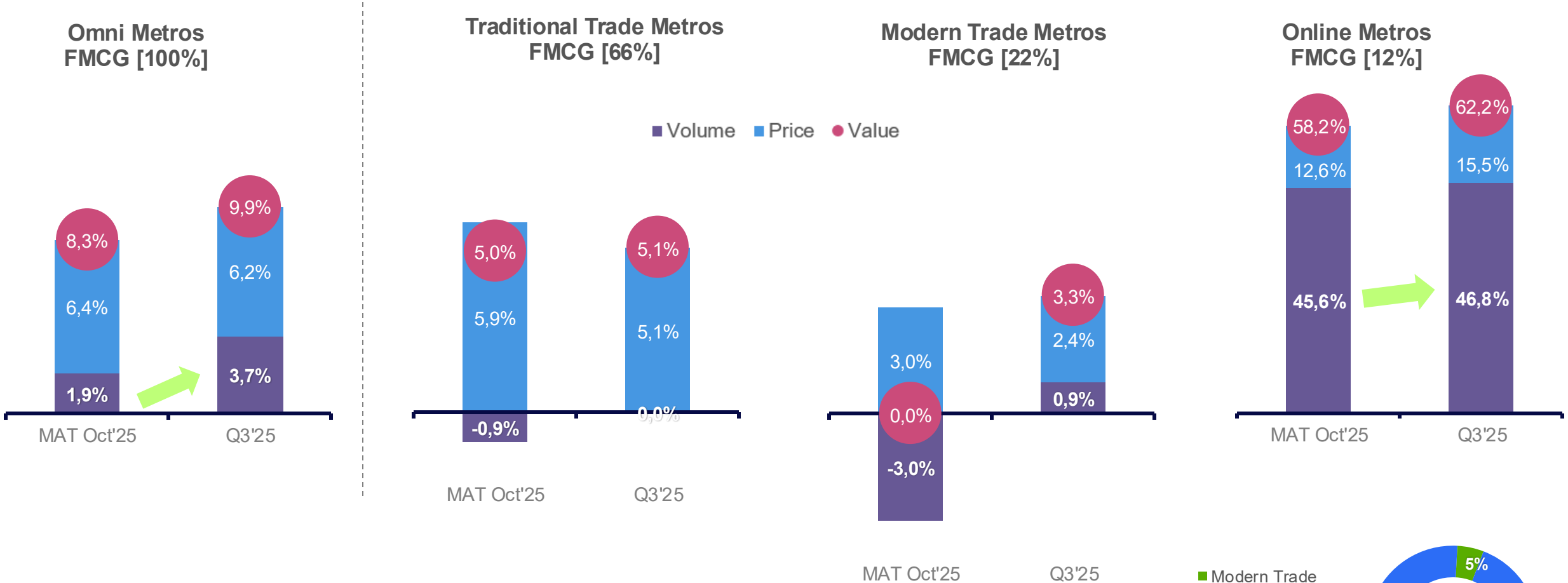
*Are New
Launches driving
incremental
Volume gain in
Online?*

*What are the key
Trends driving
New Launches –
What's the 2026
Outlook?*



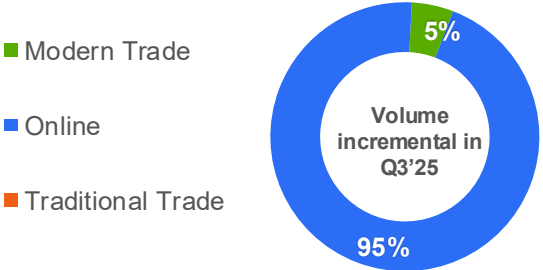
Which channel is powering the Volume gains in Metros?

Volume growth gains importance on Omni in Q3 as Offline now joins Online in driving the momentum



[] denoted Channel value contri.% - MAT Oct'25

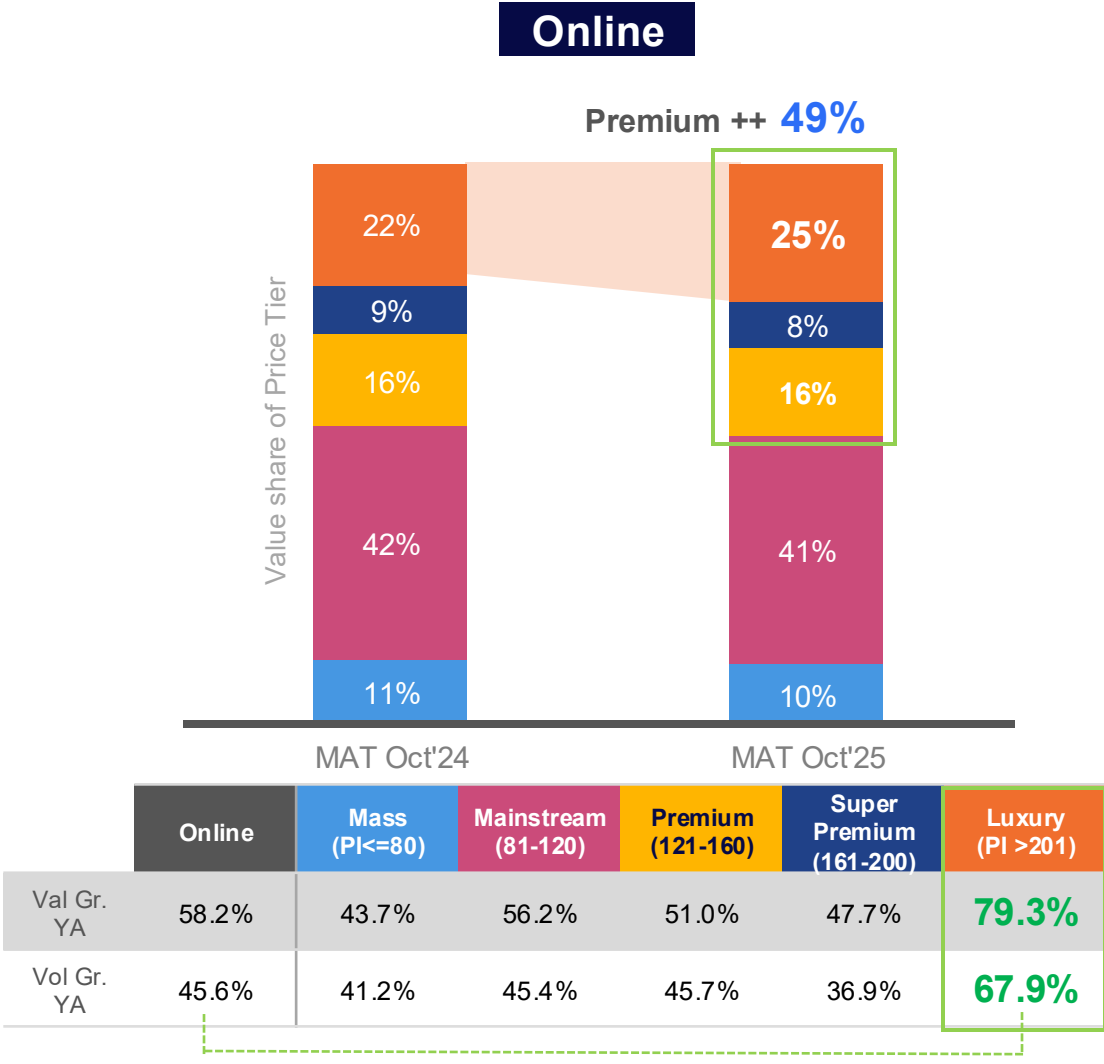
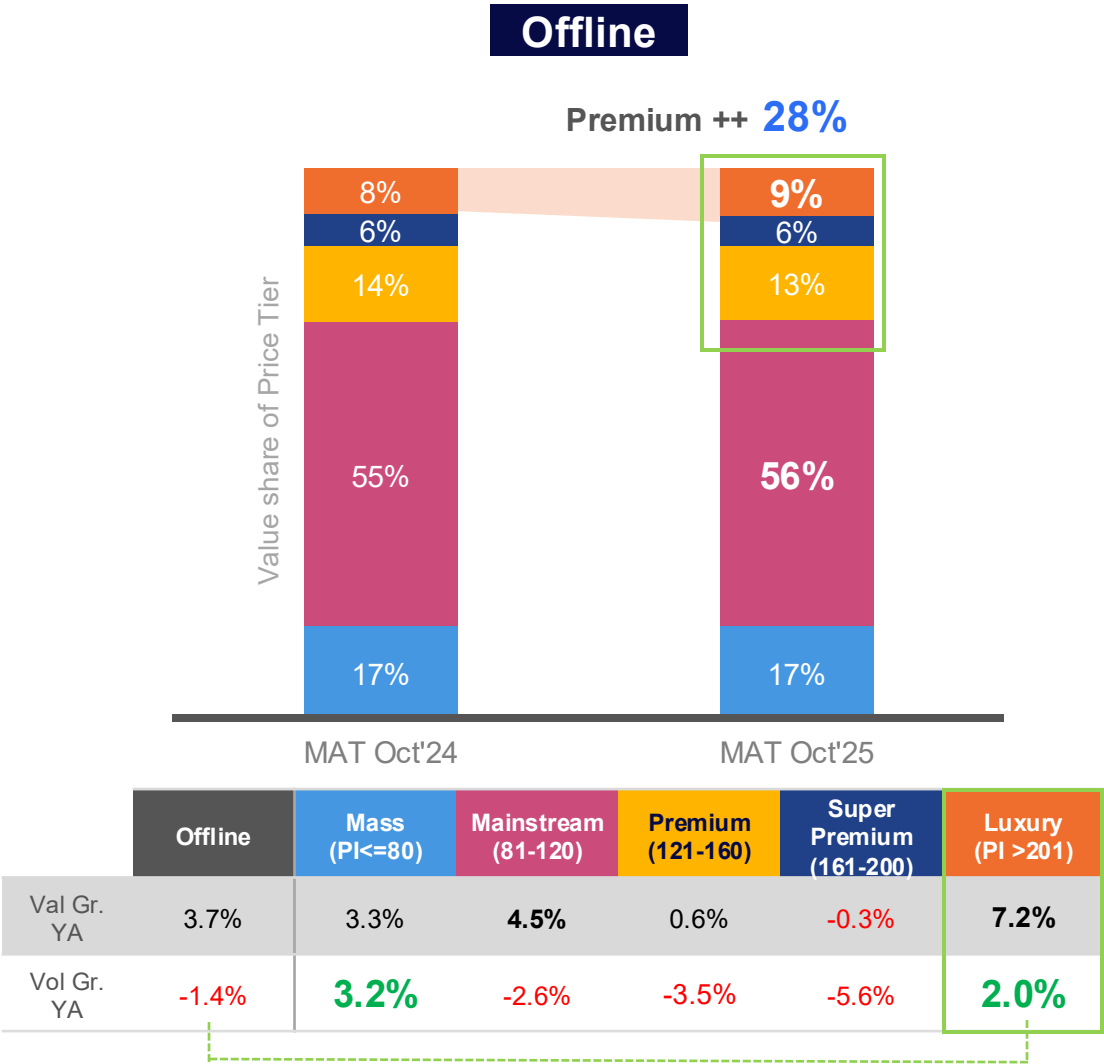
Omni definition:
FMCG is 72 like-to-like categories available within RMS as well as EMS
Markets: All India 52 Metros
Channel: TT & MT data from RMS + E-comm co-op only data from EMS





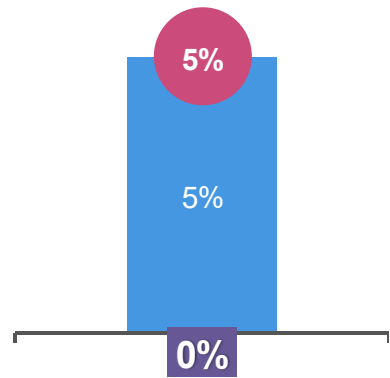
Where is Volume growth coming from?

Price Tier: Luxury tier drives both volume and value growth Online



Channel Presence: Common brands gaining on Volumes only in Online

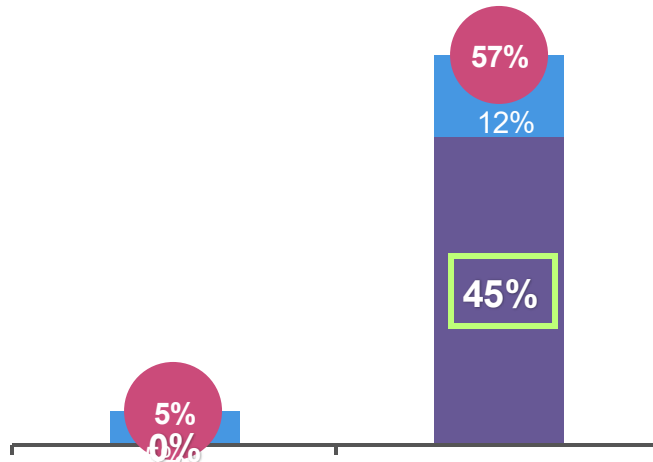
Offline Exclusive
17780 brands



Offline Exclusive
[9%]

Common
3436 brands

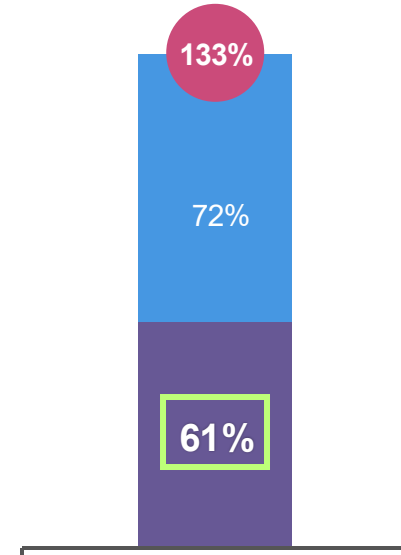
■ Price Gr ■ Volume Gr ● Value Gr



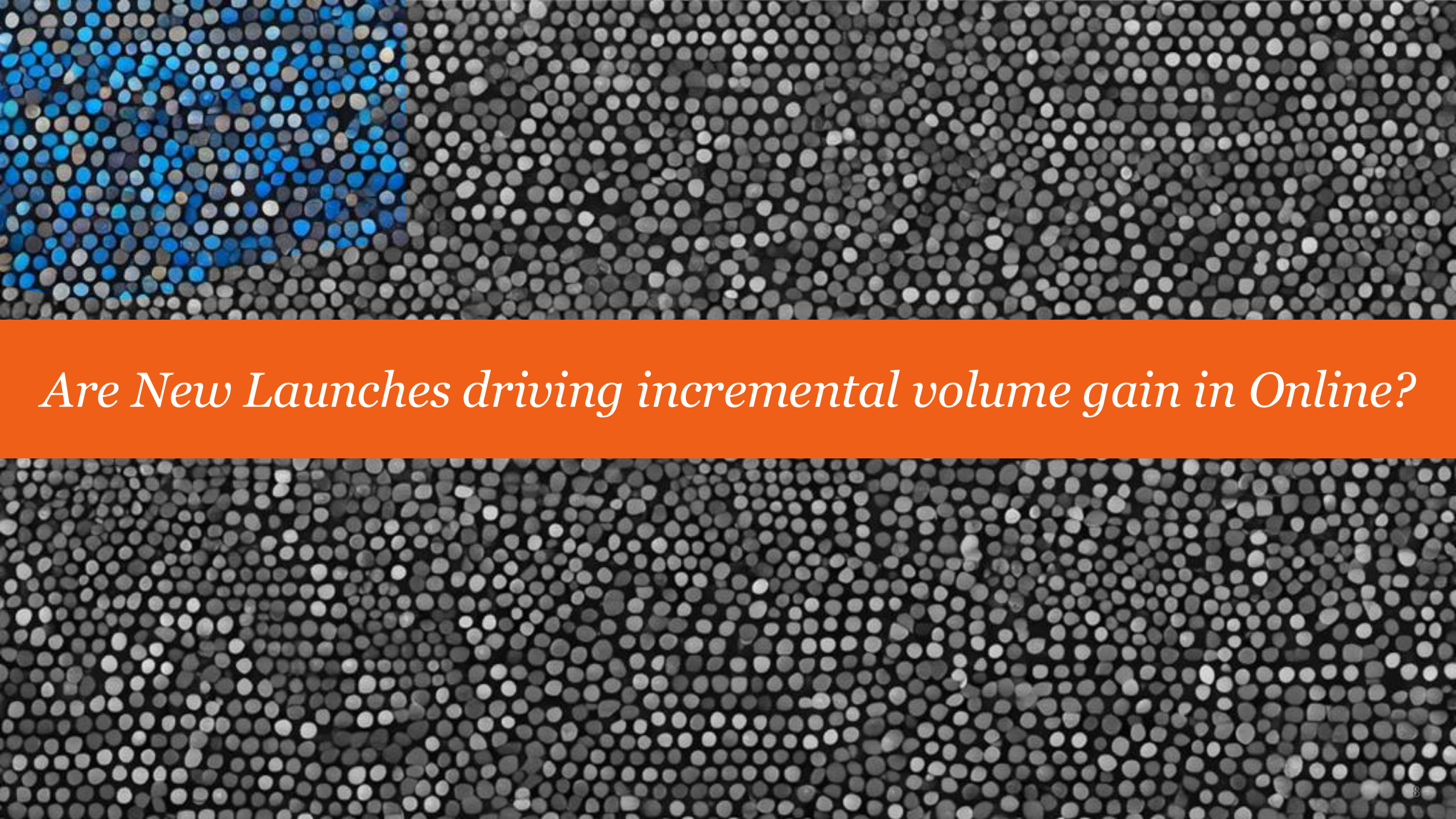
Offline Common
[91%]

Online Common
[98%]

Online Exclusive
2402 brands

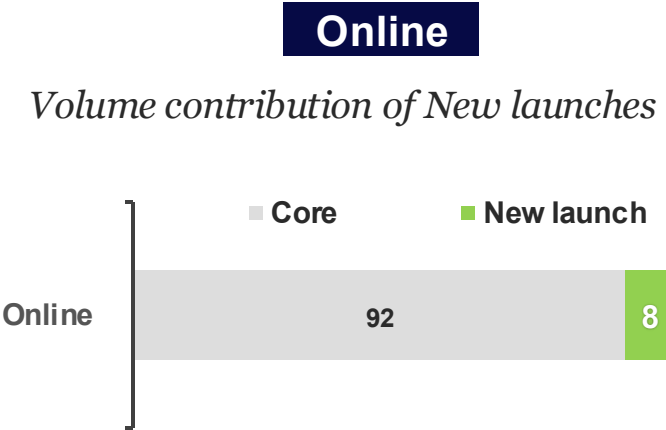
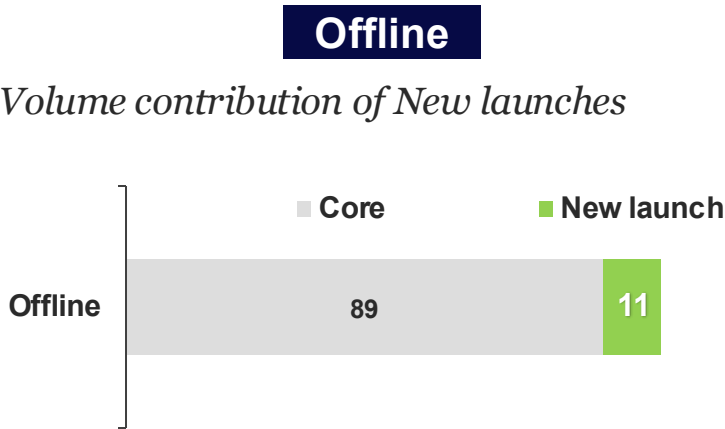


Online Exclusive
[2%]

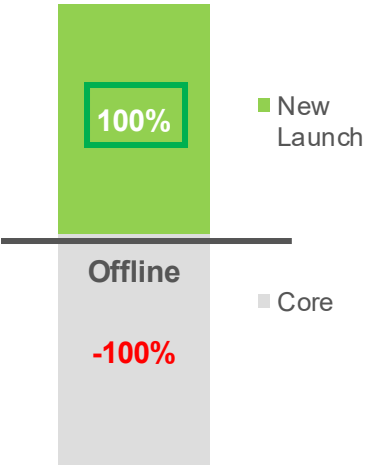


Are New Launches driving incremental volume gain in Online?

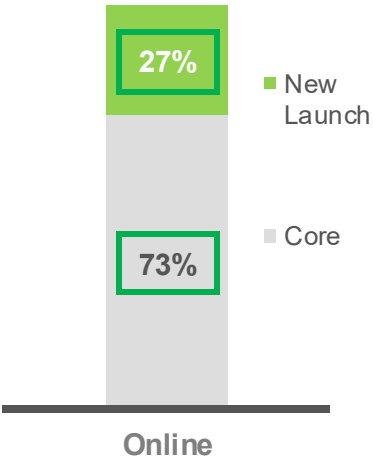
Incremental Volume gain: Online grows on strong Core + New launch; Offline depends solely on new launch



Who is contributing to the volume growth (incremental)?



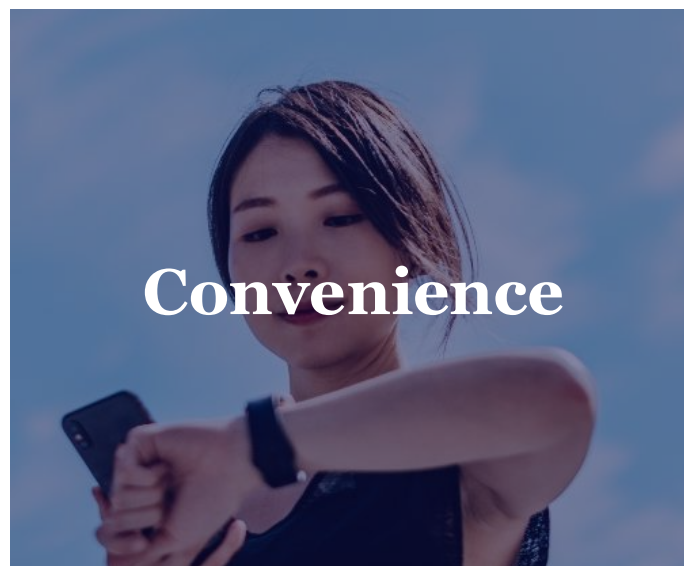
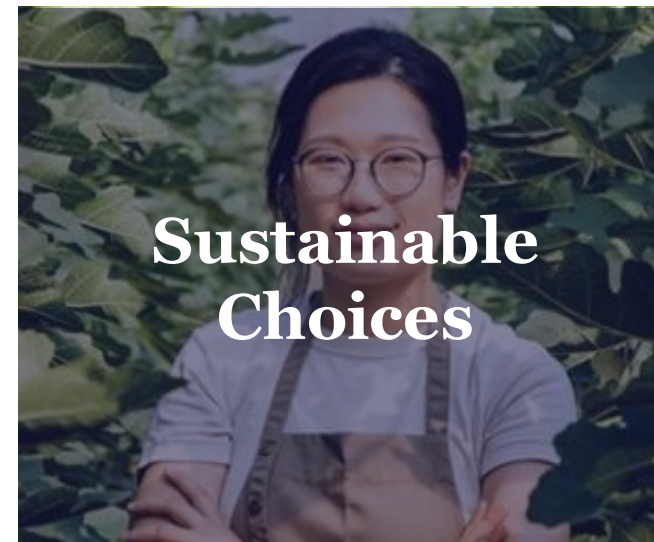
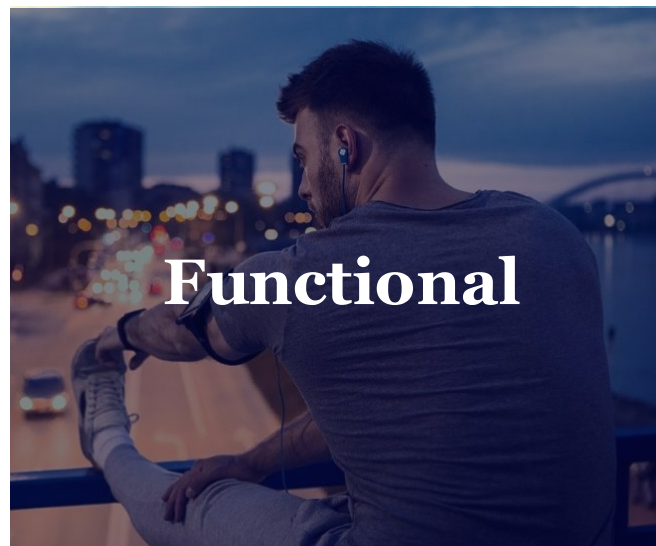
Who is contributing to the volume growth (incremental)?





*What are the Key Trends driving the online growth
- and What's the Outlook?*

Trends in Innovation



Thank you.

