

Impact of Quick Commerce on Traditional Retail in India: A Study of how 10-Minute Delivery Apps are Affecting Kirana Stores

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ABSTRACT

Since 2021, rapid commerce (Q-commerce) – ultra-fast delivery of groceries and daily essentials from small local shops or dark stores – has seen rapid growth in Indian cities. It is forecasted to generate \$7–\$11.5 billion with approximately 4,000–6,000 dark stores primarily located in major urban areas by early 2026. There are still approximately 13 million traditional “Kirana” stores across this nation and their sales contribute to the lion's share to the Indian sale of grocery and FMCG goods. This paper puts forth a simple question and relies only on secondary, publicly-available data, whether it is replacing the kirana shops or whether they are somehow going to be impacted differently. The paper identifies a real impact but one that's geographically constrained with data from NielsenIQ, company statements, government statements and peer-reviewed academic studies. In the largest metros in India which form another significant proportion of the FMCG spend, quick commerce had captured a rising share of the device's spend from traditional trade, every quarter till 2025. Outside these metros on which most of the kirana stores actually run, there is so little independent evidence and spectacular projections of the number of closures are coming from trade bodies, not substantiated data. The general trend is not of total upheaval but of uneven transformation: quick commerce has a head start in small purchases for convenience in metros and neighbourhood relationships / trust / credit remain relevance in most other parts of the world.

Keywords: Quick Commerce, Kirana Stores, Traditional Retail, India, Dark Stores, FMCG, Retail Disruption.

Introduction

With the relaunch and ten-minute deliveries, Blinkit became the first such quick commerce business in the country in 2021. It has since emerged as the fastest-growing retail format in India's more recent history, transacting over a whopping \$10 billion with an estimated 30–33 million monthly users in over 150 Indian cities. The rise has occurred due to a combination of factors, including a traditional retail sector that is said to have an estimated 13 million Kirana shops. India's sales of food and grocery products come mainly from these small neighborhood stores and maintain millions of jobs ([Invest India, n.d.](#)).

The topic is also of policy relevance. Traders' federations have taken their complaints to the Competition Commission of India (CCI) against the threat of predatory pricing and violation of the rules on foreign investment values ([MediaNama, 2025a](#)). Meanwhile, the RBI's Monthly Bulletin (17 January 2025) highlighted how consumption through e-commerce and quick commerce was “the brightening spot in the economy”, but warned that it shouldn't be impaired rather encouraged ([RBI, 2025, quoted in](#)

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MediaNama, 2025c). It moves, on the other hand, verifiable data - primarily NielsenIQ's retail-audit data - away from advocacy, separating peer reviewed academic work from surveys funded by platforms and single cities.

What Is Quick Commerce?

Quick commerce involves providing items like groceries and everyday goods within 10–30 minutes from dark stores or small distribution centers that are not open to the general public, but are typically situated within 2–3 km of the customers they provide (Unicommerce, 2026). The top 3 players in the Indian market are Blinkit, which comes with a sister company called Eternal Ltd (formerly Zomato), Swiggy Instamart and Zepto (Startupfeed, 2026).

The one starkest piece of data in this area is Blinkit's own investor disclosure as Eternal Ltd is a listed company and thus has legal reporting responsibilities. Citing Eternal Ltd's Q1 FY26 result, Blinkit's gross order value stood at ₹11,821 crore which marks its transition into the quick commerce space after surpassing the scale of the original food delivery segment of Zomato (Digitalinasia, 2026). It is also more reliable than most other such numbers as it is derived from the company's own regulatory filing. It is estimated by industry bodies such as BCG-Retailers Association of India to grow at a faster pace until FY25 to some \$7–8 billion, while others are predicting by the end of 2025 it will reach some \$11.5 billion (as cited in Startupfeed, 2026 by Datum Intelligence), with Redseer (2025) projecting further fast growth. Dark-store counts vary across sources and measurement dates.

While groceries are the biggest product category in terms of value on these platforms, fresh foods and personal care products are close on the heels, and the majority of orders come via mobile apps and in via digital payments (Fortune Business Insights, 2025).

Traditional Retail (Kirana Stores) in India

India's retail market continues to be highly informal. Roughly 18% of the total retail value is contributed by organised, modern retailers while around 82% of the retailers are unorganised, predominantly the small kirana stores in the country estimated to be about 13 million (IBM Corporate Performance sub-segment).

According to Nielsen data (as reported in Cornell SC Johnson College of Business 2026), Kirana stores account for 90% of India's FMCG sales by value and to Invest India (n.d.) has written that Kiranas contribute to around 11% of GDP and 8% of India's workforce. Moreso, AICPDF in its report (Business Standard, 2024) indicates that of a total of 13 million kiranas, over 10 million are situated outside the big cities' markets where quick commerce is currently focused, with Tier-2 towns and smaller constituting the bulk of the remaining market.

This sector has retained its traditional advantages like its closeness to the customer's home, personal relationships over several years, informal credit which is known as "khata", ability to sell even in very small quantities of goods and belief in the freshness of produce as the reasons for its survival through previous retail revolution waves (Joseph et al., 2008; Redseer, 2026).

Literature Review

- **Starting point: does a new retail format displace informal retail, or does it adapt?**

The situation is set by two studies that despite having been more than 10 years apart, are the basis of the reading of the succeeding papers. Joseph et al. (2008) report the results of a large national sample and government data on ICRIER, which indicates that on entering the market close by, the big organised retailers initially affected the sales and profits of small retailers, but that the impact disappeared in time and that also no significant adverse effects on overall unorganised sector employment were found, while small retailers responded to changes through local networks and credit relationships and personalised service. A similar finding has been obtained by Dholakia, Dholakia, and Chattopadhyay (2020). 12 years after the initial report, about the overall trend toward a modern trading system in India, formulated in the Journal of macromarketing: "Faced with this larger transition toward a modern trading system in India, kirana stores were likely to persist through adaption." What they do find is instead an expectation that comes before—and is evidence-based—that the impact of the new retail format on small shops is uneven over time and space and that the impact of decline and adaptation go hand-in-hand, rather than decline alone.

- **Demand side: why, and how much, do consumers switch?**

The three consumer-based studies conducted in different cities, using different sets of customers and methodologies all identify the same two motivations for switching – but to differing extents. A peer-reviewed research published in the Social Science Journal for Advanced Research that explored the perceived convenience and perceived price advantage, the two most significant factors in consumer behaviour, captured as high as 54% variance in consumer shifting towards quick-commerce using 2026 survey data from 400 quick-commerce users and 300 kirana store owners in Delhi NCR. An SSRN paper by Saxena (2025) surveyed consumers of the Gen Z in Bangalore which reported an extremely high switching rate (86.9%) of the people who were switching from purchasing items from kirana shops for e-commerce and quick-commerce convenience, discounts and speed. That said, a nationwide survey conducted by Singh and Agarwal (2025) in the International Journal of Research Publication and Reviews paints a different picture: Surrounding 60% of the shoppers they surveyed were using kirana grocery stores on more than half of their purchases, even as about 75% tried out quick e-commerce apps at least once and 80% indicated that they'd continue to visit local stores if quick-commerce service got better. One thing is consistent across all three: there is a reason why consumers go for quick commerce and another one for why they go to kirana stores, namely faster delivery than the former is one, while their higher prices is another. Singh and Agarwal (2025) found that 60 percent of the consumers they interviewed in the study indicated that higher prices on quick-commerce platforms were a concern.

- **Supply side: what is actually happening to kirana retailers?**

The retailer-level evidence is more limited than the consumer-level evidence, and in fact is only in a single direction, across four studies conducted in four different geographies. The Delhi NCR study mentioned above noted a high correlation between a consumer shift and kirana owners' perception of their own loss of sell, footfall and profits, finding that the correlation explained a range of 28–36% of the variation in such owner-reported loss — which, while methodologically the clearest retailer-level estimate identified for this paper, concerns the situation in one metro region. The same scenario of decline in weekly customers and transaction was observed by Patil (2025) in his study conducted on 25 kirana stores in Pune for the International Journal of Social Science Research and Review which also observed widespread efforts by the respondents to adopt digital payments and home deliveries as well as WhatsApp based ordering. In a smaller mixed-methods study reported in IJSREM (2025), it was found that there was a mix of trends: consumer foodfall in the kirana stores decreased as well as early evidence of digital adaption, but not across the board—with 41 consumers and 41 shopkeepers across Greater Noida and rural Uttar Pradesh, the results were consistent. This is more informative than any single small-sample study and shows that it has been possible to develop trends showing that adaptation appears to be the dominant trigger of decline across the three settings of a large metro (Delhi NCR), a mid-sized city (Pune), and a peri-urban/rural belt (Greater Noida and rural Uttar Pradesh).

- **Mechanism: what the dark-store and logistics literature adds**

It does not directly address the outcomes of the kirana, but does provide an explanation why quick commerce is able to compete on convenience and speed, in the first place. In their systematic literature review published in Delhi Business Review, Anaswara and Rajeswari (2025) reviewed the academic literature covering the period from 2021 to 2025, identifying that the number of published articles did increase significantly during this time and the literature focused on three areas—[logistics infrastructure, consumer behaviour, and the economic impact]. In their review, they see dark stores as micro-fulfilment centres, as much as the fact that the technology used is the ability to deliver them in ten minutes which is operational because they are distributed and located.

- **Industry research**

According to the State of Quick Commerce Market report (2024), Businesstoday (2024), Datum Intelligence has reported that 46% of quick-commerce users had cut their spending on kirana and 82% of them had redirected at least 25% of spending on kirana to online platforms. This is towards the top of the switching estimates in Section 4.2, suggesting that it may be an industry survey of platform users rather than a general population or retailer survey and is not independently peer reviewed, therefore is treated as a helpful, though less-confident, source compared with the above-referenced academic studies.

- **What the literature adds up to**

There are three general camps to be identified in the process of this work. The first is a substitution view, reflected in consumer surveys which reveal a decline in Kirana spending, and claims put forward by the retailer bodies that stated that many kiranas had to shut down. The second, is a resilience view, which argues that kiranas' relevance is continuing to hold firm as a primary shopping channel among consumers who have experimented with some quick commerce - not just a small sample ([Singh and Agarwal 2025](#)), but a substantial representative sample, if they are indeed the most significant trend. The second is a resilience view and it argues that the relevance of kiranas continues to be strong not only because of an increased number of consumers experimenting with quick commerce ([Singh and Agarwal 2025](#)), but because of a large representative sample of consumers that have done so, if that is indeed a dominant trend, and that the Kenny relation of trust and credit has continued to matter. The third perspective expressed is a heterogeneity one in which the impact is quite distinct for cities of different size, each type of product and each segment of customers, and it was first discovered by [Joseph et al. \(2008\)](#) for an earlier wave of retail change; each of the above-quoted quick-commerce-specific studies identified either full displacement or a null effect. What binds these seven studies, all conducted independently and across distinct geographical regions, methodologies, and samples, some of which are more specific to the regional convenience or pricing pressures, and some broader and national in scope — is the convergence, not the result: the shape of the change, a real margin change, not any one specific finding, is both partial and uneven, occurring at the margin, and facing wholesale and early retailer adaption. None of the studies examined provide a nationally representative test for quantification of this shape or a causal conclusion, the next area for study that this paper explores.

Research Gap

There are four gaps in the current evidence:

- A representative data source of individual Kirana stores is not available that captures their sales, footfall or closures over time. The quantitative impact on retailers is based on the estimate of a single trade body (AICPDF estimate of approximately 200,000 closures) or small, single city academic surveys (Delhi NCR, Bangalore, Pune and parts of Uttar Pradesh).
- None of the studies reviewed includes a design that will allow the determination of cause and effect (e.g., comparing similar areas where quick-commerce is high and low over time); all evidence available is based on association.
- While over 10 million of India's 13 million kiranas are not in these markets, existing hard data is limited to 8–10 of these largest cities ([Business Standard, 2024](#)).

Research Questions and Objectives

This paper is organised around six research questions:

- RQ1: How the transaction value, number of users, and geographical spread of quick commerce in India over the years?
- RQ2: What shifts in consumer buying behaviour is associated with quick-commerce adoption and how does this differ across the sizes of the cities?
- RQ3: What is the available evidence that suggests the effect of Quick Commerce on the sales, footfall and profit of Kirana stores?
- RQ4: Does this impact vary with store location, store size, product category and/or their own digital adoption?
- RQ5: What is the competitive scenario for the kirana stores?
- RQ6: Overall, what type of relationship exists between quick commerce and traditional commerce, mainly substitutive or complementary or mixed?

The purpose is to capture the size of the quick commerce market (with reliable sources); to understand the quality and extent of evidence regarding the outcomes of kirana; to distinguish between government, academic, industry and advocacy sources, and inform conclusions in a manner that reflects their relative strength; and to define the gaps in the research that is required.

Methodology

This paper only uses second-hand information, which is information that has already been gathered, published and made available to the public by other institutions. This paper does not make use of primary survey or interview data. The decision was taken on purpose: to not include another small, single-city survey in the many existing evidence-based which are already in the literature, but to attempt to integrate all that is known and critically review the evidence. Five types of secondary sources were used, with varying degrees of importance in the analysis: Statements made by Government/Regulatory bodies such as Reserve Bank of India and Competition Commission of India are considered authoritative for Government/Regulatory issues. Disclosures by the company: These include investor disclosures of company-specific information, like that of Eternal Ltd (Blinkit's parent company), which are considered highly reliable and subject to legal reporting requirements. The two peer-reviewed academic studies, namely, ICRIER's working paper from 2008, the study for Delhi NCR for 2026, and smaller city level studies were considered to be methodologically sound for the retailer level and the consumers level behaviour, but were limited in geographical coverage.

Industry and market-research reports: These reports from companies like Redseer, Datum Intelligence or NielsenIQ are deemed valuable for market size and trend direction, but where the methodology is not fully transparent is highlighted. Claims made in the name of trade bodies and advocacy groups, e.g. the estimate for number of kirana closures made by AICPDF that is treated as an opinion of an interested party, and clearly identified as such anywhere it appears. Rather, that is the one dataset which is truly time-series and has been methodologically revealed in the public domain, NielsenIQ's quarterly FMCG channel-share numbers in eight major Indian cities, is used as the most robust empirical data to support the paper's findings.

Findings from Secondary Data

- **NielsenIQ's channel-share data**

NielsenIQ reports the Quarterly FMCG Snapshot, which shows the distribution of the retail value of measured FMCG products, by Traditional Trade (kirana stores), Modern Trade (supermarkets and chains) and E-commerce (dominated by quick commerce) in the eight largest cities in India. Overall, the share of FMCG value among e-commerce increased steadily across the four quarters of 2025 (+11–13% to +18% in the October–December quarter) while the share of FMCG value among Traditional Trade declined over the same period, although Modern Trade recovered somewhat (NielsenIQ, 2025a, 2025b, 2025c, 2026). The movement of this trend was in the same direction in all the quarters under review. Around the same time, Redseer found that the value of transactions conducted via quick commerce itself increased from approximately 5% to more than 15% of the total ecommerce transaction value (Redseer, 2025, 2026). This is association and not necessarily proof of cause and effect: During this same timeframe, NielsenIQ also notes the impact of a major rate change on goods and services tax (GST) and festive season effects on consumption (NielsenIQ, 2026).

- **What the retailer- and consumer-level studies add**

Three results, at different levels of confidence, emerge when the academic and industry studies from Section 4 are combined with the NielsenIQ data:

- Strong support: According to NielsenIQ's own published data, the share of Strong Support in the largest cities of the country increased in the case of Quick commerce and decreased in the case of Traditional Trade in India up to 2025.
- Moderate support: The Delhi NCR, Pune, Bangalore and parts of Uttar Pradesh kirana owners and consumers surveyed (SSJAR, 2026; Patil, 2025; Saxena, 2025; Datum Intelligence, 2024) say they are seeing a decline in consumers' footfall and spending, and facing prof losses due to quick commerce.
- Weak or unverified: Government data and audited sources were unable to independently confirm the number of kirana stores that may have closed and the National level estimates of about 200,000 stores. Thus, caution is used in this study when using this figure and this figure is reported only as a fact quoted by industry/trade bodies and not as a fact that has been established independently.

Quick Commerce vs Kirana Stores: A Comparison

Dimension	Quick Commerce	Kirana (Traditional Retail)
Delivery speed	10–30 minutes via dark stores	Immediate for in-stock items; no formal delivery promise
Product range	2,000–5,000 items per dark store	Smaller but locally tailored range, strong in daily staples
Pricing	Frequent deep discounting; under CCI scrutiny for predatory pricing	Limited discounting; prices generally close to MRP
Customer relationship	App-based and automated	Personal, built on years of trust
Credit	None; payment is prepaid and digital	Informal credit (“khata”) widely offered
Fresh produce	Availability below 75% in some city surveys	Daily local sourcing; freshness is a key trust factor
Digital adoption	Digital-first by design	~84% of a small surveyed sample had begun some digital adoption (Indian Retailer, 2024)
Geographic reach	Concentrated in ~150+ cities; over 80% of transaction value from metros	Present in almost every neighbourhood nationwide

The Major Platforms

- **Blinkit (Eternal Ltd):** The clearest case study, since its parent company must disclose results to investors. Blinkit’s gross order value overtook Zomato’s food-delivery business in the quarter ending June 2025 (₹11,821 crore vs ₹10,769 crore), having grown 134% year-on-year the previous quarter ([DigitalinAsia, 2026](#)). It holds an estimated 45–50% share of the quick-commerce market.
- **Zepto:** Reported roughly 150% year-on-year revenue growth in FY25 and confidentially filed for an IPO of about \$1.22 billion in late 2025 ([Business Standard, 2025](#)), while also facing a CCI information request. Its market share is estimated at 20–25%.
- **Swiggy Instamart:** Run by Swiggy Ltd, with an estimated 20–27% market share depending on the source.

All three platforms are named in ongoing CCI information requests about pricing and foreign-investment structures as of late 2025 ([BW Legal World, 2025](#)). Looking ahead, a January 2026 research note from the investment bank Bernstein described quick commerce as “one of the most competitive areas of consumer India” and called 2026 “another year of discovery, not profits” ([Bernstein, quoted in Business Standard, 2026](#)).

Discussion

The strongest and most transparent evidence available — NielsenIQ’s channel-share data — supports a real but geographically concentrated substitution effect at the metro level. This lines up with the fact that over 80% of quick commerce’s transaction value itself comes from metro markets ([Redseer, 2026](#)). Outside these markets, where most kirana stores actually operate, the evidence is much thinner — not necessarily because traditional retail is unaffected there, but because no NielsenIQ-equivalent dataset for smaller towns was found for this review. This gap in the evidence is itself an important finding: claims of a nationwide kirana crisis currently rest on extrapolating from metro-concentrated data and advocacy-body estimates, not on nationally representative measurement.

The fact that kiranas still account for over 90% of FMCG sales nationally ([Cornell SC Johnson College of Business, 2026](#)), even as their share is clearly falling in the largest cities, is not a contradiction. It fits a heterogeneous-effects picture: quick commerce is substituting for a specific, convenience-driven, discretionary type of purchase in a specific set of cities, while remaining marginal to the much larger national kirana base, which depends on trust, credit, and proximity relationships that a ten-minute delivery app does not easily replicate ([BusinessToday, 2024](#)). This is broadly consistent with the ICRIER (2008) finding, from an earlier wave of retail change, that small shops adapt over time rather than disappear wholesale — though it is too early to say whether the same pattern will hold for quick commerce, since the sector is still young and rapidly changing.

Policy and Practical Implications

For policymakers, the RBI's competition-preserving stance (MediaNama, 2025a) and the CCI's ongoing information-gathering (BW Legal World, 2025) suggest that the right regulatory response is still being worked out. The evidence in this paper supports monitoring metro-level market concentration and pricing behaviour, rather than either banning quick commerce outright or leaving it completely unregulated, given that no proven, nationally generalisable harm has yet been established.

For kirana store owners, the evidence of digital adoption — with around 84% of a small surveyed sample already using some digital tool (Indian Retailer, 2024), and similar adaptation reported in the Pune and Uttar Pradesh studies — suggests that combining trust and credit relationships with basic delivery or online-ordering capability is already a real, observed response, not just a theoretical recommendation.

For quick-commerce platforms and FMCG brands, the category-specific nature of the shift (strongest in convenience and top-up purchases) suggests that a one-size-fits-all retail strategy is less useful than a category-by-category approach.

Limitations

This paper has several limitations that should be kept in mind:

- No nationally representative or store-level panel dataset exists in the public domain for this topic, so all conclusions about impact are described as associations, not proven causes.
- The key estimates on the number of kirana stores being shut were provided by trade bodies that may have an interest in the matter, and could not be independently verified with government/audited sources. These figures are not considered to be factual but rather claims.
- Dark-store counts vary substantially across sources depending on when and how they were counted; only company-disclosed figures (such as Blinkit's) are treated as reliably precise.
- The sector is changing quickly — NielsenIQ itself noted a pullback in dark-store numbers in one quarter of 2025 even as overall consumption rose — so point-in-time figures age quickly.
- Available hard data is concentrated in 8 major cities, which limits how confidently findings can be extended to the 10 million-plus kiranas operating in smaller towns.
- This paper relies on industry research whose full underlying data and sampling methods are not always fully public, and findings from these sources are reported with that caveat rather than treated as government-grade statistics.

Conclusion

In this paper, the authors have analysed the relationship between quick commerce and traditional retail in India by combining government data, company filings, peer-reviewed academic studies and industry research, and their findings suggest that the relationship between quick commerce and traditional retail in India is not consistently substitutive. The most recent available time-series data (NielsenIQ, 2025–2026) reveals a real, consistent shift in FMCG spend from Traditional Trade toward quick commerce in the largest metro cities, where quick commerce is focused. But nationally, kirana stores still make up a huge proportion of FMCG sales, and the most extreme allegation of harm is that the number of stores are being massively closed, not on data that can be verified to be true but on estimates of the kirana trade body.

The answers to the six research questions raised earlier are as follows: quick commerce is growing very rapidly (RQ1); quick commerce is associated with documented (though city specific) changes in consumer behaviour (RQ2); the impact on kirana sales, footfall and profit is real where it has been measured, but it has been measured almost nowhere outside major metros (RQ3-RQ4); kirana owners have started adopting digital and hybrid quick commerce strategies; and overall, the relationship between quick commerce and kirana is mixed and geographically uneven, rather than purely substitutive or purely complementary (RQ6). The next best thing for this field of study is a nationally representative, retailer level survey that extends beyond the small, single city survey studies reviewed here to accurately gauge the impact of quick commerce on kirana stores in Tier-2 and Tier-3 towns where they are actually located.

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