

Democratising Digital Commerce *for* One Nation One Market



Agenda for Today

1. Big Picture: Introduction to ONDC
2. Journey: Growth of ONDC
3. Impact: How ONDC is democratising e-commerce



1. Big Picture:
Introduction to ONDC

ONDC has been recognised as a national mission by the Hon'ble Prime Minister



“ONDC will revolutionise tech field by creating level playing field on digital platforms”

“Open Network for Digital Commerce' (ONDC) has also been launched for more than 1,500 Farmer Producer Organizations (FPOs) and our farmers. This will make it easier for farmers sitting in any corner of the country to sell their produce to markets anywhere”

“ONDC will promote healthy competition and unlock digital opportunities for MSMEs, Small Traders and Businesses”

Sh. Narendra Modi Ji
Hon'ble Prime Minister of India

Indian
government
recognised
several systemic
challenges during
the **COVID**
pandemic



INDIA

COVID surge: DPIIT sets up control room to monitor delivery, logistics of essential commodities



A majority of commerce in India is not digital

Significant Part Of
Retail Sector Is
Not Digitally Enabled

E-commerce Enabled

15,000

(0.125%)



12Mn

Total Kiranna
Stores in India 11

B2B commerce penetration is only at 1-1.5% in India; well below global average of 20%



E-retail penetration is only at 6-7% in India;

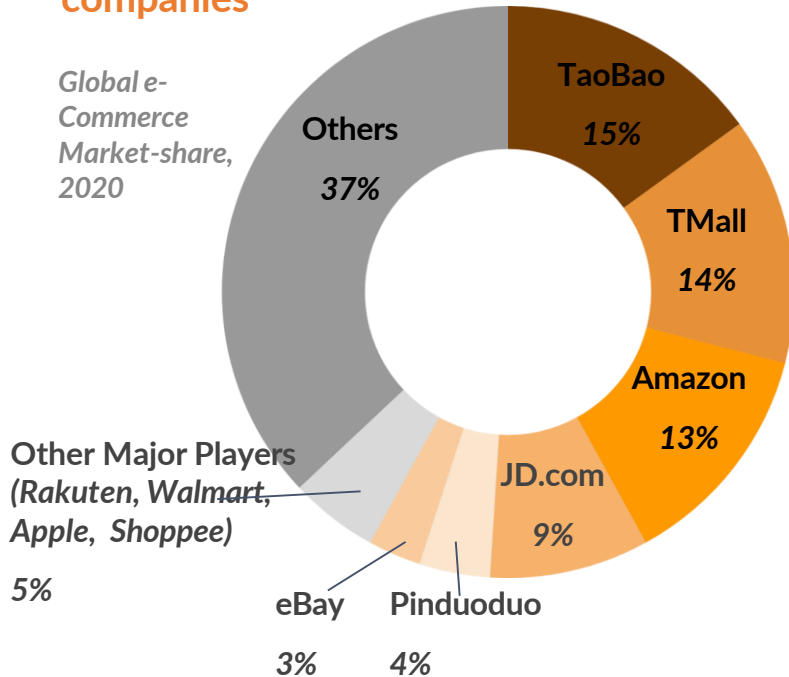
well below China (25-30%), Indonesia (20-25%), and the US (14-16%)



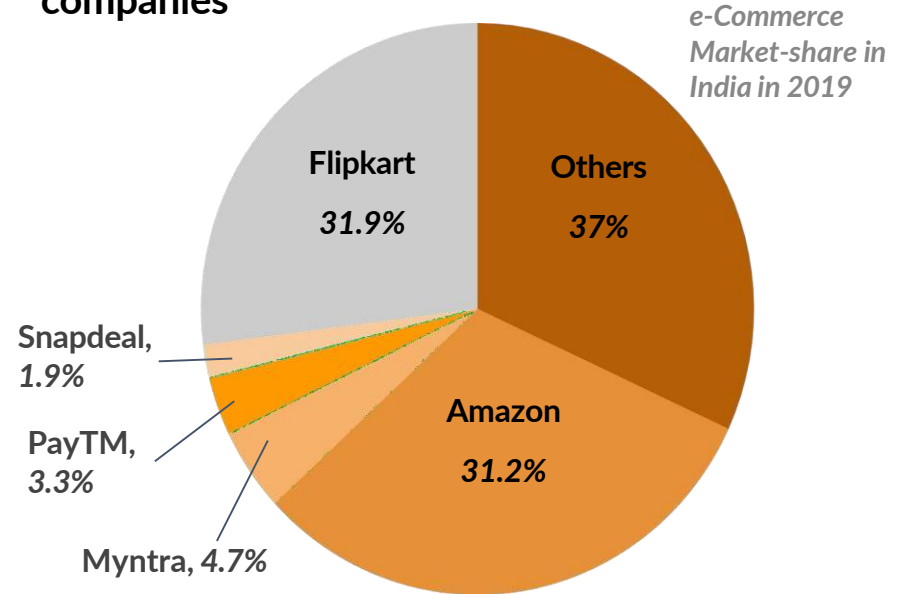
Limited share of smaller towns and rural area

Digital commerce markets are dominated by a few players

51% of global eCommerce owned by 4 companies



63% of Indian eCommerce owned by 2 Large companies



This **market concentration** has led to adverse effects across domains and sectors



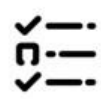
High **entry barriers** for new players



Limited **innovation**



Buyer/seller **captivity**



Limited avenues for buyers & sellers

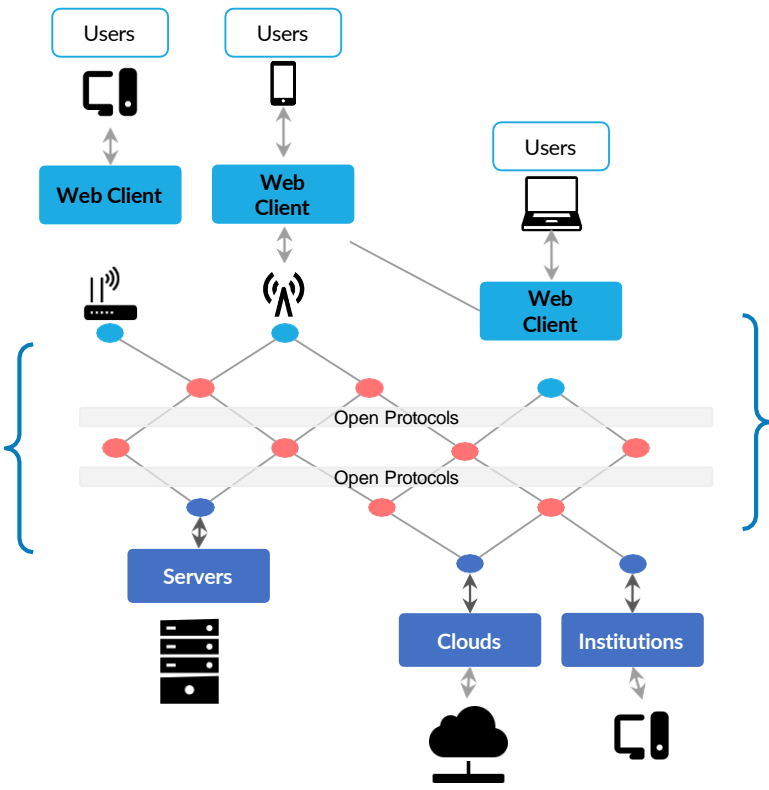


Information asymmetry leading to **market inefficiencies**

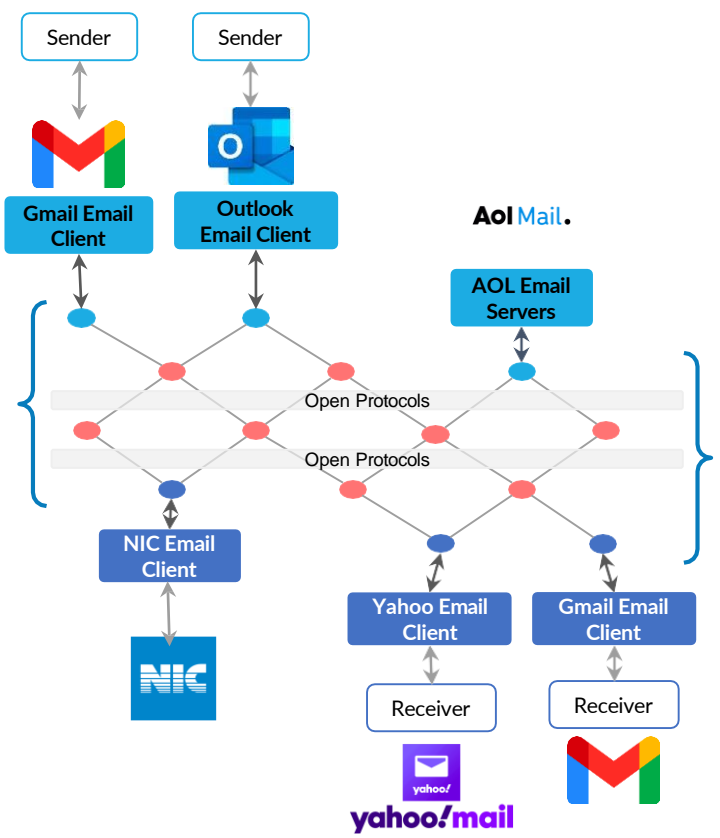


Increasing Cost of Operations & Growth

Internet & email is based on **Open Protocols & Networks, i.e. a Common Digital Language** for all systems to talk to each other



Internet: Hypertext Transfer Protocol (HTTP)



Email: Simple Mail Transfer Protocol (SMTP)

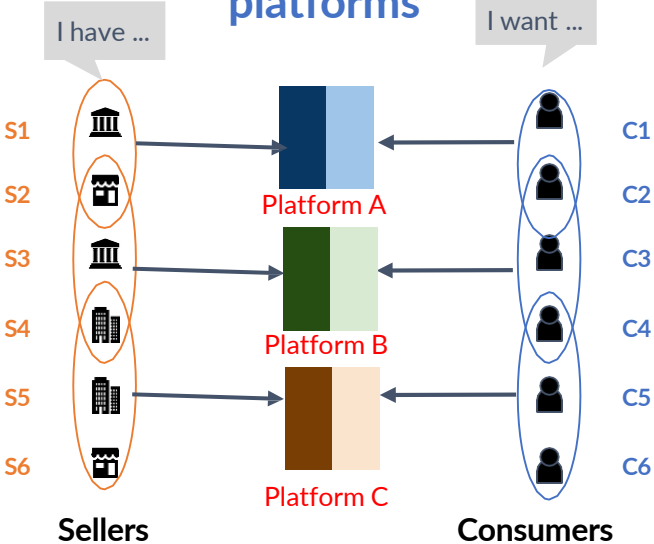
There is a clear need to shift from a platform-centric approach to a **Network-based approach** i.e. ONDC

UNBUNDLING

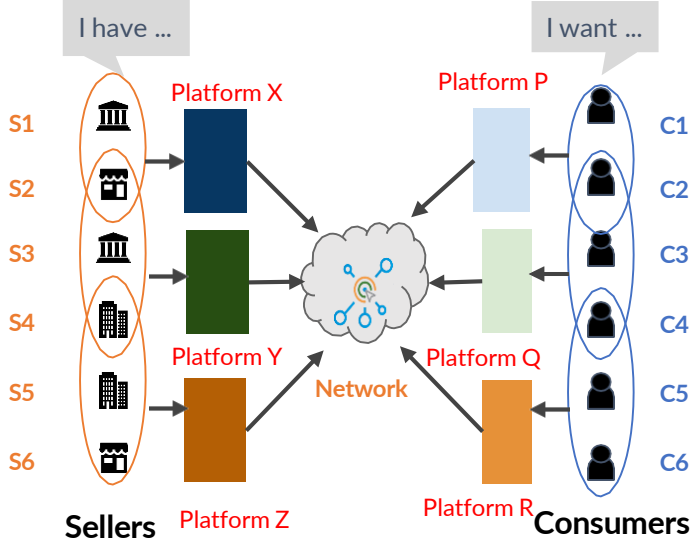


INTEROPERABILITY

From: siloed, strictly controlled platforms

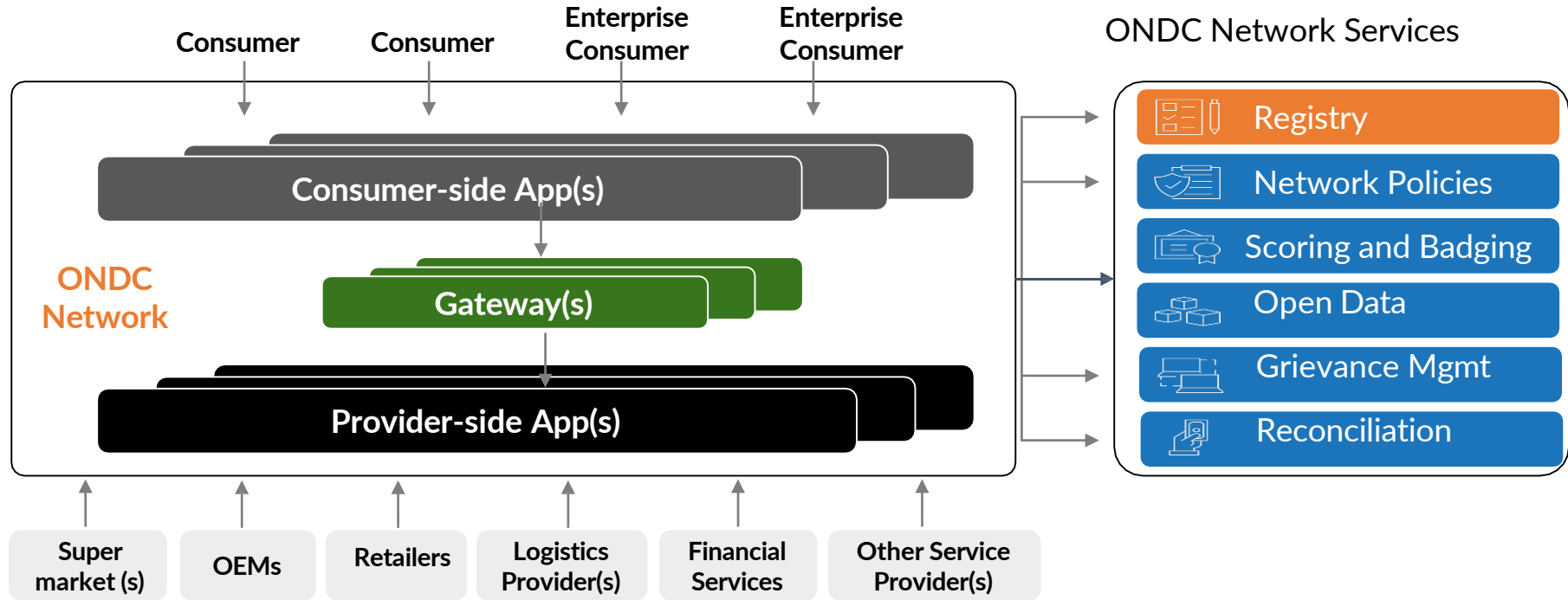


To: transactions enabled across platforms



ONDC is built with an open architecture, Protocols & Standards

Demand Side



Supply Side

Demystifying ONDC

ONDC is...

- ✓ An open network, capability, infrastructure
- ✓ Infinite models, fertile for innovation
- ✓ Eliminates need for central intermediary
- ✓ Market and Community led initiative

ONDC is NOT ...

- ✗ An application, a platform, a product
- ✗ A single model
- ✗ A central intermediary
- ✗ A regulator

ONDC will Enable Digital Transactions of **catalogable Products** | **Services**

We began with...

-  Grocery & FMCG
-  Food & Beverage

Now we also have...

-  Ride Hailing
-  Beauty & Personal Care
-  Fashion & Apparel
-  Electronics & Appliances
-  Agri Products
-  Home & Kitchen
-  Health & Wellness
-  Financial Products
-  Metro Ticketing

... and many more in pipeline

-  Industrial Equipment
-  Medical & Lab Supplies
-  Toys & Games
-  Books & Stationery
-  Sports Equipment
-  Automotive Supplies
-  Fiber & Yarns
-  Education & Training
-  Wellness & Care
-  Travel
-  Tourism & Entertainment
-  Legal Services
-  Repair, Maintenance & At-home services
-  Warehousing



ONDC's Growth

ONDC has seen **Rapid Adoption** by the Ecosystem & Growth in the past year

Jan '23

July'24

Transactions

800+

12 million+

Sellers & Service
Providers

600+

6,00,000+

Cities

5

1,100+

... with **critical density of sellers and products** slowly becoming available on the network

ONDC has footprint **pan India**, and increasing critical mass of sellers & service providers in top cities

Unique cities with **transactions**
since Jan 2024

1,100+

Countable Cities

610+

cities with >100 orders in the each of the last 3 months

Unique cities with **sellers**

520+

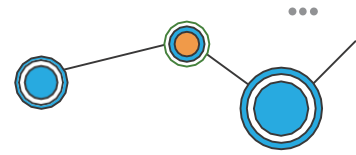
Tier 2+ cities contribute

50%

of retail orders



...with onboarding of many Top brands | Companies | Platforms



110+

Network Participants Live

17,000+

In various stages of Integration

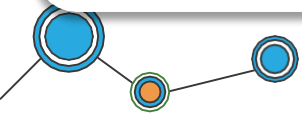
Live Now



Upcoming



... and many more



Domestic & Global companies are leveraging ONDC in diverse ways to Accelerate Growth & Diversify Value Chains...



- ✓ *Google Maps* has announced integration with ONDC to enable consumers book metro tickets on the ONDC network
 - ✓ Google Cloud's *ONDC Startup Accelerator Program* helping startups use Google's AI and LLM technologies with ONDC.
-



- ✓ Working with ONDC to enable small businesses leverage Meta platforms promote themselves irrespective of buyer apps
 - ✓ Enabling Whatsapp ecosystem build technical solution for seamless conversational buyer and seller experiences.
-



- ✓ *Ola* live on ONDC as a buyer app, enabling its customers order food through their existing consumer app and also providing logistics-as-a-service on the network.
- ✓ Plan to scale-up to other shopping domains like Grocery, Electronics etc.

Domestic & Global companies are leveraging ONDC in diverse ways to Accelerate Growth & Diversify Value Chains...



- ✓ *Mahindra Logistics* has announced onboarding on ONDC as a logistics service provider.
 - ✓ It will provide same-day & next-day intra-city pick-up and delivery services to all sellers on ONDC.
-



- ✓ *Tata Digital* has integrated as an ONDC Buyer app, enabling its customers explore diverse categories of products
-



Hindustan Unilever Limited

- ✓ *HUL* is enhancing traditional supply chains with digital transformation through ONDC.
- ✓ Onboarding its network of 10L+ retailers and kirana stores across India, to be able to make all products of the store (not just HUL) live.



**Impact: How ONDC is
democratising e-
commerce**

ONDC is expected to have a **multiplier effect** on the **entire economy**

ONDC will enable at **5-fold rise in India's digital consumption** to **\$340 bn**

- McKinsey, Democratizing Digital Commerce in India

ONDC will unleash **\$80 Billion** opportunity for startups

- Antler, India's next startup catalyst report

ONDC poised to democratise e-com, generate **\$250-300 bn** in GMV

- Redseer

... and is being received well by customers across India

Independent 3rd Party Assessment of ONDC already indicate rising popularity and adoption



BANK OF AMERICA

60% users have tried ordering already from ONDC and would **likely continue to do more**

The impact of ONDC goes beyond conventional e-Commerce...

Women of Kudumbashree Kerala

1200+ Orders in 6 months-
Want to help onboard all SHGs

... the success of ONDC is
gaining traction on the ground



Transformative Journey: Mann Deshi Foundation

The transformation of 76 Self-Help Groups (SHGs) and the Mann Deshi Foundation and Kudumbashree integration into the Open Network for Digital Commerce (ONDC) represents a pivotal movement towards digital empowerment for women entrepreneurs across India.



Received extensive support, including **hands-on training** in Satara, Maharashtra, and workshops on order fulfillment and self-marketing.

Benefited from the collaboration with ecosystem players like **SIDBI** through the **GV program**, enhancing their capabilities for digital commerce.

Achieved over **1200+ orders** collectively through ONDC, enhancing the economic independence and market exposure of these women-led enterprises.

Transformative Journey: Sri Vidhya Handlooms



Sri Vidhya Handlooms achieved pan-India market access and credibility through ONDC, inspiring the community's younger generation to embrace the digital scaling of the business.

Transitioned from traditional sales to e-commerce, expanding product listings from **20 to 900**, and stabilizing at **400** enhanced digital catalogues.

Accumulated over **1200 orders**, demonstrating the potential of digital networks like ONDC to elevate traditional businesses in the marketplace.

Inspired the **younger generation** within the community to **pursue digital expansion**, increasing business scalability.

Making digital commerce more inclusive for Street Vendors

ONDC has started a pilot with MagicPin to onboard Street Food Vendors

- ✓ Initial pilot started in Lucknow and Delhi from Mar '24
- ✓ ONDC Team has onboarded 500+ street food vendors who have already received 7,000+ order till date.
- ✓ **Initial pilots show a 25% increase in income for street vendors**
- ✓ This program may be expanded with the support of MoHUA for all PM Svanidhi beneficiaries



ONDC has launched QR codes for sellers to be visible on any app for ordering


Enables demand driving activities for stores directly without having to pay commission for ads



ORDER FROM US ONLINE ON
ONDC NETWORK

Save | Scan | Shop

Gopal Sweets and Snacks Centre




How to order

- SAVE**
Click and save a picture of this QR code.
- SCAN**
The QR code works with a QR code scanner or in-app scanner of the ONDC Buyer apps like Paytm* or MagicPe*. Install either of those apps on your phone.
*For Paytm users, kindly update the app to the latest version 15.03.
- SHOP**
Shop from us online.

Note:- Orders made online after closing will be dispatched the next day.

ONDC NETWORK par ab har business ke liye Bharat khulega



35 Lakh+ farmers are connected to ONDC thro' 7000+ FPOs



FPOs Success Stories

United by ONDC

9 FPOs from Dinajpur, West Bengal came together to promote their products in e-rickshaws. Collectively they have received **14,000+ orders** on the ONDC network.



*Naoda Hemtabad Agro Producer company, an FPO (Farmer Producer Organization) from Malda, West Bengal celebrated **crossing 1,600 orders** on the ONDC network.*

Currently they have received 2,600+ orders through the ONDC Network

SFAC with ONDC has released clickable PDFs for FPO products



Black wheat atta

Mithlalach FPCL

Patna, Bihar

₹ 90 | Qty: 1 kg



Black wheat flour, made from premium quality black wheat. A gluten-free, non-GMO, high-fiber, and low-carb option. It's super healthy, packed with antioxidants & fiber that are great for your body.

[Click here to order](#)



Mystore New Delhi All What are you looking for? Sell on ONDC ONDC NETWORK

Home / Grocery / Masala & Seasoning



Black Wheat Atta - 1kg

₹90

Sold By: Mithlalach Farmer Producer Company Limited

1 ADD TO CART



- Product details
- Product Description
- Vendor details

ONDC is bringing online diverse products from across India which were not available online

ONDC's **"Amazing India"** program showcases unique products from farmers and social sector sellers

Govt. Emporiums/PSUs	100+
Social enterprises & NGOs	100+
FPOs & O-FPOs	7,000+
Self Help Groups	200+
Weaver/ Artisans group	600+

AMAZING INDIA

Discover India's Richness Through Authentic Treasures

A collage of images showcasing various Indian handicrafts and products. The collage includes a woven basket, a wooden chair, a framed artwork, a woman in a sari, a Buddha statue, a bicycle, and a pair of shoes. The images are arranged in a diamond pattern on a light pink background with decorative pink shapes.

Increasing Accessibility for the Rural Population with CSC and other Assisted Commerce partners

- ✓ ONDC is working with Common Services Centers (CSCs), under the Ministry of Electronics and Information Technology (MeitY), to enable e-commerce access to rural citizens across India.
- ✓ This initiative will enable the integration of CSC's e-Grameen app on the ONDC Network as a buyer application, allowing citizens across rural India to access its vast e-commerce Network.



*Increased reach and accessibility
through 5 Lakhs+ CSC centres
across India*

*ONDC is initiating pilots in assisted commerce to enable every village in India
can access and benefit from Digital Commerce*

ONDC is working towards making eCommerce accessible across every app India in Indic Languages for increased adoption and access

ONDC is working closely with Bhashini to help the ecosystem develop apps and ecommerce journeys in Indic Languages

ONDC and Bhashini are working on multiple areas to help develop Indic - language experiences, including:

- ✓ Reference app in Indic languages released
- ✓ Hackathons for ecosystem to help adopt indic languages

Working towards Enabling voice-based interfaces in Indic Languages



ONDC is continuously simplifying for sellers and consumers to understand and join the network

For Customers:

- ✓ Video in **14 Indian languages** to easily understand ONDC.
- ✓ **ONDC Official Consumer app** to help customers understand ONDC being launched.

For Sellers:

- ✓ Whatsapp Bot “ONDC Sahayak” launched in 5 languages, to be extended to 22 languages.
- ✓ **Seller Handbook and Social Sector Handbook** are available in **14 languages** and are being distributed widely

ONDC working with content creators to develop **creative digital content** to help simplify ONDC



ONDC has been executing multiple programs towards **Skilling, Training, Capacity Building & Hand-holding**



Online Training

*ONDC has delivered 300+ hours of virtual training on ONDC & 200+ hours of technical training through open digital sessions, attended by **50,000+** startups, students, businesses leaders, bureaucrats etc.*



Physical Training

300+ training workshops for sellers, participants, bureaucrats, startups, students, FPOs, students, companies, businesses leaders, bureaucrats etc. across 50+ cities across India



Technical Masterclasses

50+ technical masterclasses for startups, developer ecosystems and experts with tech leaders like Google, Meta and SAP



Research Programs

Research & training programs with educational institutions like Harvard, Stanford, Wharton, University of Michigan, IIM-A, IIM-B, ISB, IIT-D, NID, NIFT etc.



Seller Handbooks

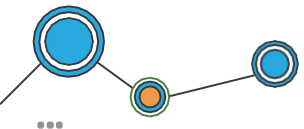
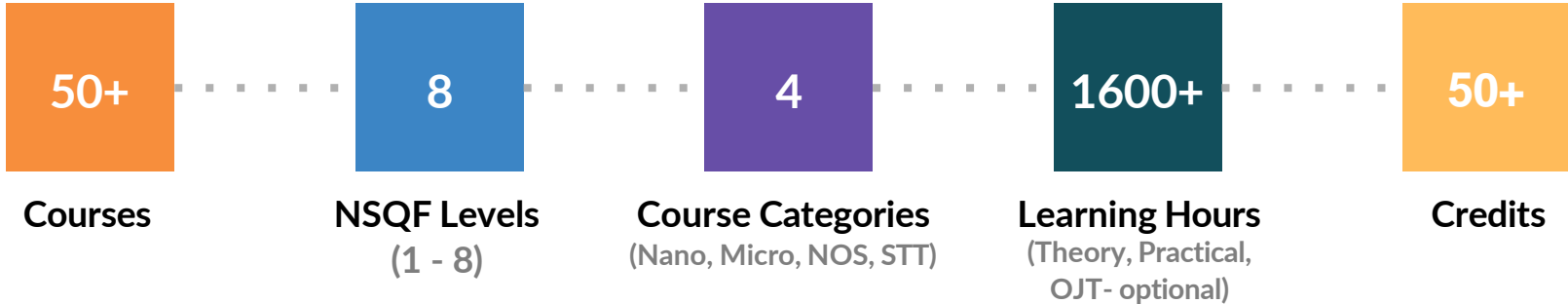
Handbook to help sellers (especially first time sellers) succeed in digital commerce in 14 languages and are being distributed widely

ONDC Academy is partnering with UGC & NCVET to enable training and capacity building around eCommerce adoption across India



Equip the entire ONDC ecosystem, **from grassroot level sellers to industry experts**, with the necessary skills relevant to the eCommerce industry with ONDC

The courses are specifically designed to cater to the E-Commerce industry leveraging ONDC

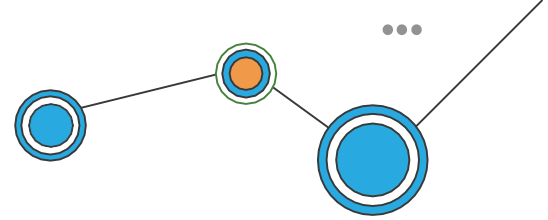


ONDC has started laying the foundations for exports by every seller and merchant in India

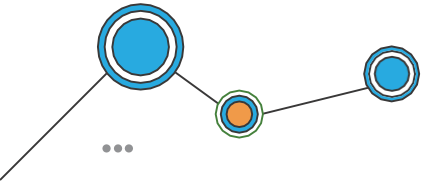
- ✓ We have piloted the first Export transactions with Singapore.
- ✓ Middle - East and South - east asian markets on priority
- ✓ D&B is issuing Duns Number to weavers, artisans, FPOs and MSMEs on ONDC network to build credibility and visibility especially for exports.



dun & bradstreet



...towards a vision of
building India
into a
\$10 Trillion Economy



The slide features a white background with decorative elements: a large orange curved shape on the left side and a black curved shape on the top right corner.

THANK YOU