

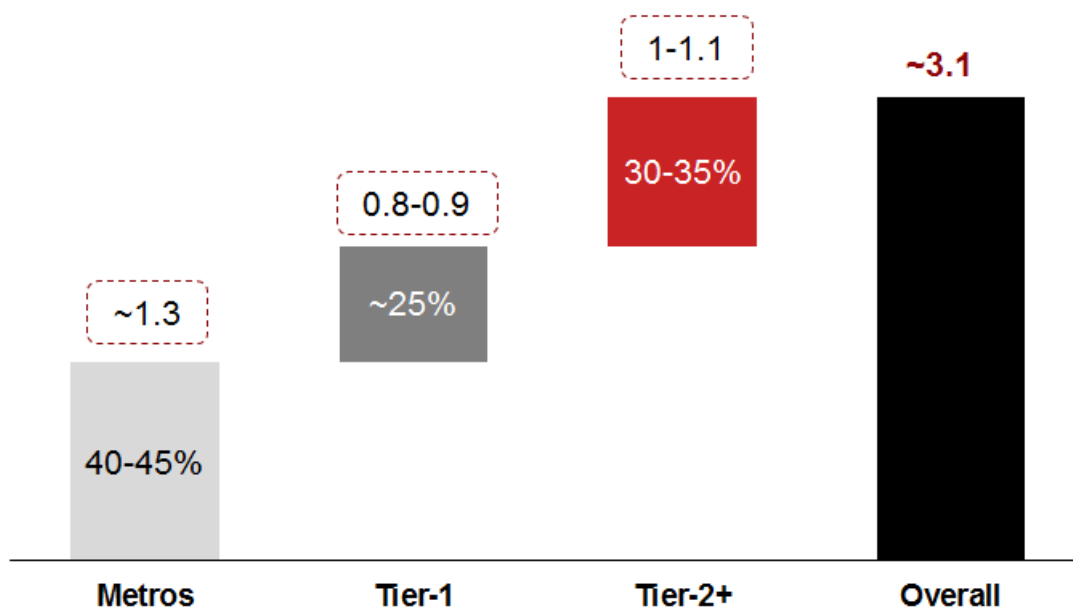


Fashion E-tailing Stories:

Online fashion has stronger penetration in Metros, however contribution from smaller cities is also significant

All the leading horizontal players receive more than 25% of their sales from tier-2+ cities leading to higher share of online fashion from tier-2+ as compared to overall online retail.

Online Fashion – Tier wise split, USD Billion

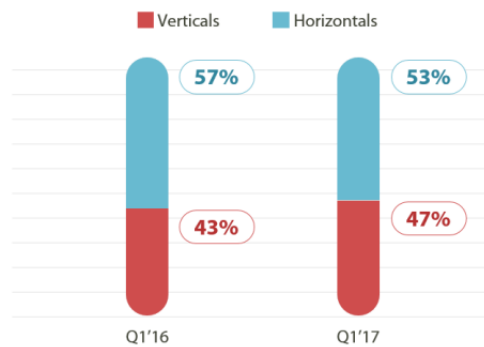


Verticals have been narrowing the gap with horizontals in online

fashion.

While the Flipkart's and Amazons of the world continue to have an edge in the online fashion market during festive sale quarters, the market split nearly 50-50 for the other quarters as verticals are increasingly asserting themselves. Growing number of fashion-conscious consumers are attracted to verticals by their superior consumer experience and their collection of high quality and affordable private labels.

Online fashion retail, GMV share of Horizontals vs Verticals
As a % of total fashion market



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