

Digital Disruptors: The Global Competitive Landscape of Delivery Platforms

October 2022

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INTRODUCTION

Scope

Key findings

STATE OF PLAY

Desire for greater convenience leads consumers to expect even faster delivery speeds

STATE OF PLAY

Foodservice delivery aggregators usher in a new era of on-demand delivery

Foodservice delivery aggregators' success paves the way for same-day retail delivery

Consumer demand for faster delivery creates opportunity for quick commerce players

COVID-19 pandemic leads to explosion in rapid delivery sales around the world

Due to the pandemic, once-specialised delivery players branched out into other areas

In 2022, the on-demand delivery industry faces new challenges

In addition to other challenges, delivery disruptors face mounting regulatory scrutiny

PROFILES OF DELIVERY DISRUPTORS

Demaecan (Demaecan Co Ltd)

Deliveroo (Deliveroo Plc)

Delivery Hero (Delivery Hero SE)

DoorDash (DoorDash Inc)

Ele.me (Alibaba Group Holding Ltd)

Getir (Getir Perakende Lojistik AS)

GoFood/GoMart (GoTo Group)

Gopuff (GoBrands Inc)

HappyFresh (Icart Group Indonesia PT)

iFood (iFood Agencia de Servicos de Restaurantes Ltda)

Just Eat Takeaway.com (Just Eat Takeaway.com NV)

Meituan (Meituan Inc)

Rappi (Rappi Inc)

Swiggy (Bundl Technologies Pvt Ltd)

Wolt (DoorDash Inc)

Uber Eats (Uber Technologies Inc)

PROSPECTS

Despite the darkening short-term outlook, the future of on-demand delivery looks secure

E-commerce giants are increasingly encroaching onto on-demand delivery players' turf

As competition in on-demand delivery intensifies, industry consolidation appears likely

The outlook for on-demand delivery

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