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Influence of Q-Commerce on Supply Chain Efficiency and Customer Loyalty in India: A Systematic Literature Review

Sunil Kumar[1], Seema Devi[2*], Parveen Vashisth[3]

[1]Associate Professor, Department of Business Administration, Chaudhary Devi Lal University, Sirsa, India, Email: Dr.sunilkumar@cdlu.ac.in
[2*]Corresponding Author, Research Scholar, Department of Business Administration, Chaudhary Devi Lal University, Sirsa, India, Email: seemadochaniya082@gmail.com
[3]Assistant Professor, Department of Business Administration, Chaudhary Devi Lal University, Sirsa, India, Email: parveen.mba@cdlu.ac.in

Abstract

Quick commerce (Q-commerce), the ultra-fast delivery segment of e-commerce promising doorstep delivery within 10–30 minutes, has emerged as one of the fastest-growing retail formats in India, with gross order value rising roughly 24-fold between 2022 and FY25 to about Rs. 65,645 crore (US$7.4 billion) (India Brand Equity Foundation, 2026). This systematic literature review (SLR), structured around PRISMA guidelines and drawing on Scopus-indexed academic papers, seminal marketing and supply chain theory, and allied industry sources, synthesises existing research on the growth trajectory of Q-commerce relative to traditional e-commerce, its influence on supply chain efficiency and delivery responsiveness, its effect on purchase intention, satisfaction and loyalty, and the operational challenges and opportunities distinctive to the Indian market. The review grounds its conceptual framework in established theories of service quality (Parasuraman et al., 1988), consumer loyalty (Oliver, 1999), the Stimulus-Organism-Response paradigm (Mehrabian & Russell, 1974), and supply chain management (Mentzer et al., 2001; Christopher, 2016), while identifying gaps for future empirical research on profitability-efficiency trade-offs and loyalty formation in non-metro markets.

Keywords: Q-commerce, quick commerce, supply chain efficiency, customer loyalty, purchase intention, dark stores, systematic literature review, India

1. Introduction

E-commerce in India transformed retail by removing the need for physical store visits, with the market projected to reach USD 200 billion by 2026 and USD 350 billion by 2030 from USD 52.57

billion in 2020, driven by smartphone penetration, relaxed FDI norms, and digital payment infrastructure such as UPI (Ranjekar & Roy, 2023). Within this landscape, Q-commerce has arisen as a distinct sub-category defined by delivery windows of 10–30 minutes through dense networks of "dark stores"—micro-fulfilment centres of roughly 400–2,000 square metres stocking around 1,000–2,500 SKUs, positioned close to residential demand clusters (Ranjekar & Roy, 2023; IBEF, 2026). The India Q-commerce market size stood at USD 3.65 billion in 2026 and is projected to reach USD 6.64 billion by 2031, growing at a CAGR of 12.74% (Mordor Intelligence, 2026), while other estimates place FY22–FY25 growth at a CAGR as high as 142%, with gross order value reaching approximately Rs. 64,000 crore in FY25 (Economic Times, 2025).

Unlike traditional e-commerce, where delivery windows span a day to a week using centralised mega-warehouses and delivery trucks, Q-commerce relies on distributed dark stores and two-wheeler delivery fleets, targeting single-person and small households with immediacy-driven "top-up" and "unplanned" purchase needs rather than bulk "stock-up" purchases (Ranjekar & Roy, 2023). Understanding this shift requires drawing on established theoretical foundations in supply chain management (Mentzer et al., 2001), logistics strategy (Christopher, 2016; Fisher, 1997), service quality (Parasuraman et al., 1988), and consumer loyalty formation (Oliver, 1999; Dick & Basu, 1994). This SLR addresses four objectives: (1) comparing Q-commerce growth against traditional e-commerce in India; (2) examining Q-commerce's influence on supply chain efficiency, delivery speed and operational responsiveness; (3) assessing its influence on purchase intention, satisfaction and loyalty while proposing a conceptual framework; and (4) identifying key challenges and opportunities in designing and managing Q-commerce supply chains in the Indian context.

2. Methodology: Systematic Literature Review Framework

This review follows the PRISMA (Preferred Reporting Items for Systematic Reviews and Meta-Analyses) protocol, which provides structured guidance on how a systematic review should be planned, conducted and reported so that findings are transparent and reproducible (PRISMA Statement, n.d.; Page et al., 2021). The PRISMA approach is widely adopted in management and business research SLRs because it enforces a stepwise identification, screening, eligibility and inclusion process rather than an ad hoc narrative review (Technische Universität Berlin, 2020; Fisch & Block, 2023; Bettany-Saltikov & McSherry, 2016).

2.1 Search Strategy and Database

The primary literature search was conducted using the **Scopus database**, supplemented by Google Scholar, ResearchGate, and institutional repositories (IIM Ahmedabad, SDMIMD) to capture emerging and grey literature on a fast-evolving commercial phenomenon not yet fully indexed in peer-reviewed outlets. Search strings combined Boolean operators across three conceptual clusters: (A) phenomenon terms ("quick commerce," "q-commerce," "instant delivery," "10-minute delivery"), (B) supply chain terms ("supply chain efficiency," "dark store," "last-mile delivery," "logistics," "operational responsiveness"), and (C) consumer outcome terms ("customer loyalty," "purchase intention," "customer satisfaction," "service quality"). A representative Scopus search string used was: `TITLE-ABS-KEY(("quick commerce" OR "q-commerce") AND ("supply chain" OR "logistics" OR "dark store") AND India)`, following documented Scopus PRISMA search conventions (AJB Channel, 2025; Binghamton University Libraries, 2023).

2.2 Inclusion and Exclusion Criteria

Criterion	Inclusion	Exclusion
Publication type	Peer-reviewed journal articles, conference proceedings, seminal theoretical works, institutional working papers, reputable industry reports	Non-verifiable blogs, promotional content without data
Geographic focus	India-focused Q-commerce studies; globally applicable theoretical frameworks (service quality, loyalty, SCM)	Studies with no conceptual or empirical relevance
Timeframe	Foundational theory papers (1974–2004) plus contemporary Q-commerce studies (2020–2026)	Superseded/retracted studies
Language	English	Non-English without translation
Topical relevance	Supply chain efficiency, delivery speed, customer loyalty/satisfaction/purchase intention theory and application	Studies unrelated to retail logistics or digital consumer behaviour

2.3 PRISMA Flow of Study Selection

The review process proceeded through four PRISMA stages: **Identification** (records located via Scopus and supplementary searches), **Screening** (titles/abstracts screened for relevance, duplicates removed), **Eligibility** (full-text review against inclusion/exclusion criteria), and **Inclusion** (final

corpus retained for synthesis) (Wibowo et al., 2023; Page et al., 2021; Massachusetts General Hospital [MGH] Libraries, 2025). The final corpus integrates seminal theory (Parasuraman et al., 1988; Oliver, 1999; Mentzer et al., 2001; Mehrabian & Russell, 1974; Davis, 1989; Reichheld, 2003; Bhattacherjee, 2001) with contemporary Q-commerce-specific academic studies (Ranjekar & Roy, 2023; Panesar, 2026; academy of business journals supply chain study, 2025) and triangulating industry data (IBEF, Mordor Intelligence, Economic Times, KenResearch, Redseer) to compensate for the limited volume of peer-reviewed literature on this nascent sector.

3. Growth of Q-Commerce vs. Traditional E-Commerce in India

Q-commerce differentiates itself from traditional e-commerce along delivery time, inventory architecture, and target consumer segment. Huang and Yen's comparative framework, cited in Ranjekar and Roy (2023), distinguishes the two models on delivery time, delivery mode, target household size, and behavioural driver. Fisher's (1997) foundational supply chain typology—distinguishing "efficient" supply chains optimised for cost against "responsive" supply chains optimised for speed and flexibility offers a theoretical lens for this shift: traditional e-commerce approximates an efficient supply chain, while Q-commerce is a purpose-built responsive supply chain (Fisher, 1997, as cited in Christopher, 2016). Traditional e-commerce evolved from single central warehouses (~40,000 sq. ft, 50,000–100,000 SKUs, 1–3-day fulfilment) toward dark-store networks (~1,500–2,500 sq. ft, 1,500–2,500 SKUs, 20–45 minute fulfilment) (Ranjekar & Roy, 2023).

The scale of this shift is substantial: Q-commerce gross order value grew roughly 24-fold from 2022 to reach Rs. 65,645.40 crore (US$7.4 billion) by FY25 (IBEF, 2026), while CareEdge estimated a 142% CAGR during FY22–FY25 with the market reaching approximately Rs. 64,000 crore, trending toward Rs. 2 lakh crore by 2028 (Economic Times, 2025). KenResearch data corroborates this with the sector valued at ₹22,000 crore in FY2023 growing to ₹33,000 crore by FY2025, alongside 4.5x growth in non-food category GMV and over 20,000 dark stores mapped across metros (KenResearch, 2025). Mordor Intelligence projects continued but more moderate expansion from USD 3.65 billion in 2026 to USD 6.64 billion by 2031 at a 12.74% CAGR (Mordor Intelligence, 2026).

Dimension	Traditional E-Commerce	Q-Commerce
Typical delivery time	3–5 days	10–30 minutes (Edgistify, 2025; Ranjekar & Roy, 2023)
Inventory architecture	Centralised mega-warehouses	Distributed dark stores (Ranjekar & Roy, 2023)
SKU range	50,000–100,000+	~1,000–2,500 (Ranjekar & Roy, 2023)
Delivery mode	Trucks, standard courier	Two-wheelers, hyperlocal riders (Ranjekar & Roy, 2023)
Supply chain type (Fisher, 1997)	Efficient supply chain	Responsive supply chain (Christopher, 2016)
COD share (India)	~45%	~70% (Edgistify, 2025)
RTO rate	~9%	~4% (Edgistify, 2025)

4. Influence on Supply Chain Efficiency, Delivery Speed, and Operational Responsiveness

The Q-commerce supply chain is engineered around minimising every second between order placement and dispatch, embodying the "responsive supply chain" ideal articulated by Fisher (1997) and elaborated by Christopher (2016) around responsiveness, reliability, and relationships as the basis of competitive logistics (Christopher, 2016). Dark stores are expected to complete storing, replenishing, picking, packing and dispatch within roughly five minutes (Ranjekar & Roy, 2023). Mentzer et al.'s (2001) canonical definition of supply chain management as the coordination of business functions across firms to align supply with fluctuating demand provides the theoretical grounding for the tight integration Q-commerce requires between Order Management Systems, warehouse design, and last-mile logistics (Mentzer et al., 2001). Bullwhip-effect theory (Lee et al., 1997, as commonly cited in supply chain literature) further explains why Q-commerce operators favour hyperlocal, low-inventory dark stores over centralised distribution minimizing demand-signal distortion across a shortened, localised supply chain (Lee et al., 1997).

Empirical evidence on efficiency gains from dark-store-based micro-fulfilment shows measurable improvements: one industry analysis found dark-store-enabled orchestration cutting fulfilment time by roughly 35%, reducing RTO incidents by about 18%, and improving fuel efficiency by around

18% relative to conventional courier hubs (Edgistify, 2025). Density thresholds matter substantially dark stores are considered a strategic asset once demand density exceeds 300 orders per day per square kilometre (Edgistify, 2025). Rao and Goldsby's (2009) typology of supply chain risk—spanning environmental, industry, organisational, problem-specific, and decision-maker factors—offers a useful diagnostic frame for the operational fragilities documented in Q-commerce dark-store networks, including inventory shrinkage and demand volatility risk (Rao & Goldsby, 2009). Academic work on supplier relationship management finds that strategic supplier cooperation combined with AI, IoT, and blockchain-enabled visibility strengthens speed, cost-efficiency, and sustainability outcomes simultaneously in Q-commerce operations (Academy of Business Journals, 2025).

However, operational responsiveness at scale reveals structural strain outside metro markets. Order density per dark store falls from over 1,100 orders per day in metro regions to as low as 350 in smaller towns, while per-order logistics costs run roughly 25% higher and average order values roughly 35% lower in non-metro geographies (India Dispatch, 2025). Illustrative unit-economics modelling shows a typical dark store's fulfilment cost running near ₹18.87 per order against total daily operating costs of roughly ₹26,417, driven predominantly by staffing (~54%) and rent/utilities (~46%) (Gandhi, 2024).

5. Influence on Purchase Intention, Customer Satisfaction, and Loyalty

Delivery speed, live order tracking, and reduced decision friction are consistently identified as primary drivers of Q-commerce purchase intention (Ranjekar & Roy, 2023). This aligns with Parasuraman, Zeithaml, and Berry's (1988) SERVQUAL model, which established reliability, responsiveness, assurance, empathy, and tangibles as the five core dimensions of perceived service quality that drive downstream satisfaction (Parasuraman et al., 1988). Dabholkar's (1996) technology-based self-service model extends this to digitally mediated retail contexts, proposing that consumers evaluate technology-enabled service both on functional attributes and overall affective response—directly applicable to app-based Q-commerce ordering (Dabholkar, 1996). Zeithaml, Berry, and Parasuraman's (1996) behavioural consequences model further links perceived service quality to retention behaviours, providing theoretical support for the delivery-reliability-to-loyalty pathway observed in Q-commerce (Zeithaml et al., 1996, as cited in Oliver, 1999).

Oliver's (1999) seminal loyalty theory argues that satisfaction is a necessary but insufficient condition for loyalty, which ultimately depends on perceived product superiority, personal fortitude, and social bonding (Oliver, 1999). This builds on Oliver's (1980) earlier cognitive model of satisfaction as a function of expectation and disconfirmation (Oliver, 1980, as cited in Oliver, 1999), and parallels Bhattacherjee's (2001) Expectation-Confirmation Model, which explains continued IS/app usage as a function of confirmed expectations and perceived usefulness—a lens well suited to explaining repeat Q-commerce app usage (Bhattacherjee, 2001). Dick and Basu's (1994) integrated framework similarly conceptualises loyalty as the strength of the relationship between relative attitude and repeat patronage, moderated by social norms and situational factors—directly relevant to Q-commerce's convenience-driven repeat-purchase behaviour (Dick & Basu, 1994, as cited in Oliver, 1999). Reichheld's (2003) Net Promoter methodology, which identifies willingness to recommend as the strongest behavioural indicator of loyalty, offers a practical loyalty metric that Q-commerce platforms could adopt to validate satisfaction-loyalty linkages (Reichheld, 2003).

A dedicated study on Q-commerce adoption in the Indian market examines technological, social and marketing stimuli alongside service-related antecedents shaping perceived value, trust, and usage intention (Panesar, 2026). Delivery partner working conditions have also been shown, via the Stimulus-Organism-Response (S-O-R) paradigm originally developed by Mehrabian and Russell (1974) for environmental psychology and since adapted to consumer and retail contexts, to influence brand goodwill and retail patronage intention (Mehrabian & Russell, 1974). Dedicated research on delivery speed and customer satisfaction in Q-commerce confirms a direct relationship between fulfilment speed and satisfaction outcomes (IJSREM, n.d.).

5.1 Proposed Conceptual Framework

Synthesising the reviewed theory and empirical literature, this SLR proposes a conceptual framework grounded in the S-O-R paradigm (Mehrabian & Russell, 1974): **Q-commerce supply chain capabilities** (dark-store density, OMS integration, delivery-partner conditions) act as the environmental **stimulus**; consumers' cognitive-affective evaluation of **perceived service quality** (per SERVQUAL dimensions; Parasuraman et al., 1988) constitutes the **organism** state; and **purchase intention**, **satisfaction** (per the expectation-confirmation logic of Oliver, 1980, and Bhattacherjee, 2001), and ultimately **customer loyalty** (per Oliver, 1999, and Dick & Basu, 1994)

represent the **response**. Two feedback loops complete the framework: satisfied, loyal customers generate word-of-mouth acquisition (consistent with Reichheld's, 2003, recommendation-based loyalty logic) that reduces customer acquisition cost, while loyalty-driven order-frequency growth improves dark-store order density, strengthening supply chain unit economics and sustaining service quality (Ranjekar & Roy, 2023; India Dispatch, 2025).

6. Challenges and Opportunities in Q-Commerce Supply Chain Management in India

6.1 Challenges

- **Profitability–speed trade-off:** Deep discounting erodes margins, with adjusted EBITDA margins as low as -11.67% reported for a leading platform in a given quarter (Gandhi, 2024; Thakur, 2025).
- **Non-metro unit economics:** 25% higher logistics costs and 35% lower average order values in smaller cities push breakeven thresholds to 1.5–2x metro levels (India Dispatch, 2025).
- **Supply chain risk exposure:** Applying Rao and Goldsby's (2009) risk typology, Q-commerce dark stores face elevated environmental (demand volatility), organisational (staffing turnover), and problem-specific (inventory shrinkage) risks relative to traditional retail supply chains (Rao & Goldsby, 2009).
- **Delivery partner strain:** Increased workload intensity and vehicle load optimisation limitations strain last-mile logistics (Ranjekar & Roy, 2023).
- **Trust deficits with new/rural users:** Roughly 25% of new users in emerging geographies are new to the platform ecosystem with lower digital trust (India Dispatch, 2025).
- **Real estate and regulatory pressure:** Scarcity of prime dark-store locations and emerging municipal regulation of zoning and rider wages (1Page, 2026).

6.2 Opportunities

- **Category expansion:** Movement into OTC pharma, skincare, electronics, with non-food GMV growing 4.5x between FY2022 and FY2025 (KenResearch, 2025).
- **Technology-enabled automation:** AI, IoT, and blockchain-enabled visibility improve fulfilment accuracy and reduce operating costs (Academy of Business Journals, 2025; Ranjekar & Roy, 2023).

- **Hybrid and omnichannel models:** Asset-light partnerships and physical-plus-digital formats allow expansion without full dark-store capital intensity (India Dispatch, 2025; Thakur, 2025).
- **Private label and higher-margin categories:** Strategic shift toward private-label products is central to improving contribution margins (Thakur, 2025).
- **Dark-store density as competitive moat:** Neighbourhood-level density compounds into a flywheel of faster delivery and greater order volume (1Page, 2026).
- **Overall market headroom:** Growth projections toward USD 6.64 billion by 2031 or Rs. 2 lakh crore by 2028 suggest continuing investment headroom (Mordor Intelligence, 2026; Economic Times, 2025).

7. Discussion and Research Gaps

Cross-referencing the reviewed sources reveals a consistent tension: the responsive supply chain architecture (Fisher, 1997) that gives Q-commerce its delivery-speed advantage is the same architecture straining profitability once demand density falls below critical thresholds (India Dispatch, 2025; Gandhi, 2024). Viewed through Oliver's (1999) loyalty framework, this raises a theoretically important question: if satisfaction from speed is necessary but insufficient for loyalty, and loyalty ultimately depends on social bonding and perceived product superiority, are Q-commerce platforms over-investing in speed relative to product assortment and brand trust-building (Oliver, 1999) ? A further gap is the paucity of large-sample, India-specific empirical studies quantifying the loyalty-elasticity of delivery speed once it falls below a "good enough" threshold—most existing academic literature addresses adoption antecedents (Panesar, 2026) or business-model description (Ranjekar & Roy, 2023) rather than loyalty quantification using validated instruments like SERVQUAL (Parasuraman et al., 1988) or Net Promoter Score (Reichheld, 2003). Future research should also apply Rao and Goldsby's (2009) risk typology empirically to Indian dark-store networks and examine loyalty formation among non-metro and digitally new users separately from established urban users (Rao & Goldsby, 2009; India Dispatch, 2025).

8. Conclusion

This SLR demonstrates that Q-commerce has fundamentally restructured Indian retail logistics by substituting centralised warehousing with distributed, density-optimised dark stores that embody Fisher's (1997) "responsive supply chain" ideal, achieving delivery-time compression that outpaces

traditional e-commerce by more than an order of magnitude (Ranjekar & Roy, 2023; Edgistify, 2025; Christopher, 2016). This operational transformation drives customer purchase intention, satisfaction, and loyalty primarily through consistent product availability, delivery reliability, and transparency rather than speed alone—consistent with SERVQUAL (Parasuraman et al., 1988), the S-O-R paradigm (Mehrabian & Russell, 1974), and Oliver's (1999) loyalty theory, as captured in the conceptual framework proposed in Section 5.1. However, the same infrastructure that enables this speed advantage generates acute profitability and efficiency challenges outside dense metro markets, positioning unit-economics discipline, category diversification, and hybrid operating models as the central strategic levers for the sector's next growth phase in India (India Dispatch, 2025; Thakur, 2025; KenResearch, 2025).

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