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## Impact of Quick Commerce on Traditional Kirana Stores in Haryana: An Assessment of Retailers' Perception, Business Performance, and Customer Loyalty

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**ABSTRACT:** Quick commerce, the delivery of groceries and daily essentials within 10 to 20 minutes from neighbourhood dark stores, has grown faster than any other retail format in India. This study assesses what that growth means for traditional kirana stores in Haryana, with attention to three outcomes: how retailers perceive the new competitor, how their business performance is affected, and whether their customers remain loyal. The study adopts an exploratory, secondary-data design. Evidence is drawn from industry reports by Datum Intelligence, Redseer Strategy Consultants, HSBC Global Research and Research and Markets, from the All India Consumer Products Distributors Federation (AICPDF), from a July 2026 mapping of dark stores in Haryana, and from recent peer-reviewed surveys of kirana owners in Delhi NCR and Pune. Nationally, the quick commerce market is estimated at US\$6.78 billion in 2025, and about 21% of its 2024 sales, worth US\$1.28 billion, came out of kirana purchases. Kirana stores nevertheless held about 91% of the grocery market in 2025. Haryana had 333 dark stores across 25 cities in July 2026, of which 74.5% were in Gurugram and Faridabad alone. The impact on kirana stores is therefore highly uneven within the state: severe in the NCR belt, emerging in the district towns, and almost absent in rural areas. Survey evidence indicates that about half of urban kirana owners report a strong effect on sales, that most have responded with home delivery, phone ordering and digital payments, and that few intend to move their business online. Customer loyalty holds where the kirana offers what quick commerce cannot: credit, small-ticket purchases and personal trust. The paper proposes a district-level exposure framework and policy measures for retailers, platforms and the state.

## 1. INTRODUCTION

The neighbourhood kirana store has been the centre of grocery retail in India for generations. It is small, family-run and close to the customer's home; it sells in small quantities, extends credit to households it knows, and takes orders by phone. Supermarkets and e-commerce changed the margins of this business over two decades without displacing it. Quick commerce is a different kind of competitor, because it competes on the kirana's own ground: immediacy and convenience for small, frequent purchases.

The format has expanded rapidly. Research and Markets (2026) values the Indian quick commerce market at US\$5.48 billion in 2024 and US\$6.78 billion in 2025, after compound annual growth of 71.2% between 2020 and 2024. The leading platforms each operated around 1,000 dark stores by December 2024, and HSBC Global Research (2025) projected 5,000 to 5,500 dark

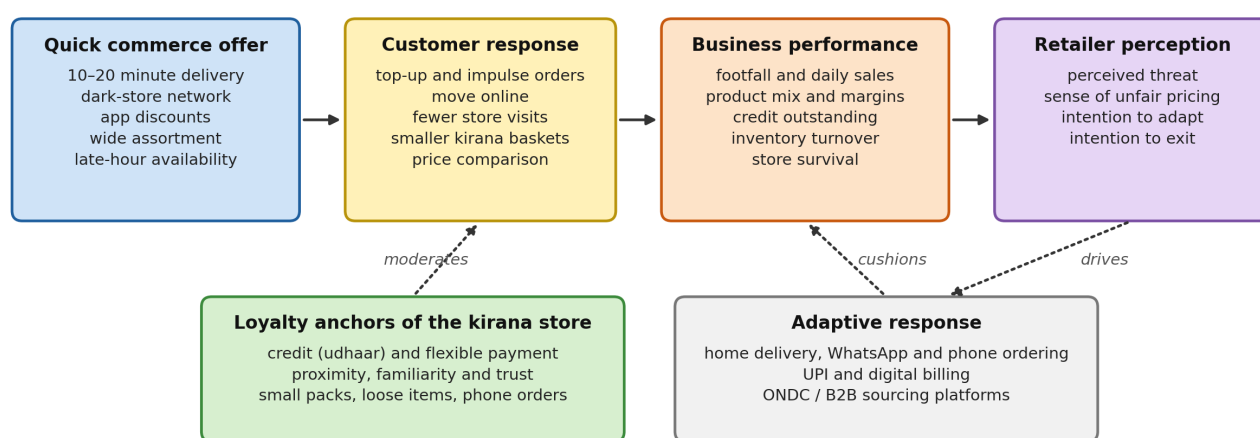
stores across the sector by 2025-26. The All India Consumer Products Distributors Federation (2024) claimed that about two lakh kirana stores had shut in a single year as customers moved to these platforms.

Haryana provides a useful setting for studying this change. The state contains Gurugram, the headquarters of the country's largest quick commerce platform and one of its densest delivery markets, alongside industrial towns such as Faridabad and Panipat, mid-sized district centres such as Karnal, Rohtak and Hisar, and a large rural population served almost entirely by small shops. Within a single state, kirana stores therefore face every level of exposure, from saturation to none.

## 2. CONCEPTUAL FRAMEWORK

Three ideas guide the analysis. Christensen's (1997) theory of disruptive innovation holds that a new entrant can displace established firms by serving a need that incumbents treat as marginal and then moving into their core business. Quick commerce began with urgent, top-up purchases and is now extending into planned monthly shopping. Store-choice research on Indian shoppers shows that proximity, convenience and the relationship with the retailer are the main reasons for choosing a neighbourhood store (Sinha & Banerjee, 2004), and that kirana stores are strong on location but weaker on price promotions, assortment and store environment (Goswami & Mishra, 2009). Quick commerce attacks the first advantage and exploits the second set of weaknesses. Oliver's (1999) account of loyalty distinguishes repeat purchase based on habit or convenience from loyalty based on commitment; only the latter survives when a more convenient alternative appears.

Figure 1 sets out the framework used in this study. The quick commerce offer changes customer behaviour; the change in customer behaviour affects the business performance of the kirana store; and performance shapes the retailer's perception of threat and the decision to adapt or exit. Two factors intervene. The loyalty anchors of the kirana store moderate how far customers shift, and the retailer's adaptive response cushions the effect of that shift on performance.



**Figure 1.** Conceptual framework: how quick commerce affects kirana stores

Source: Authors' construction based on Christensen (1997), Oliver (1999), Sinha and Banerjee (2004) and Goswami and Mishra (2009).

## 3. OBJECTIVES AND RESEARCH METHODOLOGY

The study pursues four objectives:

- (i) to trace the growth of quick commerce nationally and its spread across the cities of Haryana;
- (ii) to assess the effect of quick commerce on the business performance of kirana stores;
- (iii) to examine how kirana retailers perceive quick commerce and how they have responded; and
- (iv) to identify the factors that sustain customer loyalty to kirana stores and suggest measures to strengthen them.

The design is exploratory and descriptive, relying on secondary data and documentary analysis. Four categories of sources were used. The first comprises industry and market research reports on quick commerce and grocery retail published between 2024 and 2026. The second is the state report of QuickCommerceMap (2026), which records dark stores in Haryana by city and platform as of July 2026, compiled from publicly observable store-locator information. The third is trade-body evidence, mainly the AICPDF statement of October 2024. The fourth is peer-reviewed survey research on kirana retailers, selected where it reported retailer-level outcomes: Bansal (2026) for Delhi NCR and Patil (2025) for Pune.

Shares, absolute numbers derived from percentages, and the concentration index reported in Section 5 are the authors' calculations from the cited figures. Concentration of dark stores across cities was measured by the Herfindahl–Hirschman index, the sum of squared city shares. Because the sources differ in period, definition and method, and because trade-body figures reflect the position of an interested party, the findings are interpreted as indicative associations and not as measured causal effects.

## 4. TWO RETAIL MODELS COMPARED

The kirana store and the quick commerce platform serve the same need by different means. Table 1 compares them on the dimensions that matter for competition.

**Table 1.** Kirana store and quick commerce platform compared

| Dimension           | Kirana store                                       | Quick commerce platform                        |
|---------------------|----------------------------------------------------|------------------------------------------------|
| Location and reach  | Within the neighbourhood; walk-in and phone orders | Dark store serving a 2–3 km radius; app orders |
| Typical order value | About ₹100–200; loose and small packs              | Above ₹400; packaged goods                     |
| Price and promotion | Near maximum retail price; few offers              | App discounts funded by platforms and brands   |
| Assortment          | Limited by shelf space                             | Several thousand items, including non-grocery  |
| Credit              | Informal monthly credit to known households        | None; prepaid or digital payment               |
| Relationship        | Personal and long-standing                         | Impersonal; managed by app                     |
| Cost structure      | Family labour; owned or low-rent premises          | Rent, riders, technology and marketing         |

Source: Compiled by the authors from Redseer Strategy Consultants (2026), Datum Intelligence (2024) and Goswami and Mishra (2009).

The comparison shows where the two overlap and where they do not. They compete directly for the packaged, branded, mid-value basket of the urban household that has a smartphone and a digital payment account. They do not yet compete for the low-value, loose or credit-based purchase, which Redseer Strategy Consultants (2026) describes as unviable for online grocery.

## 5. Scale and Trends: National and Haryana Evidence

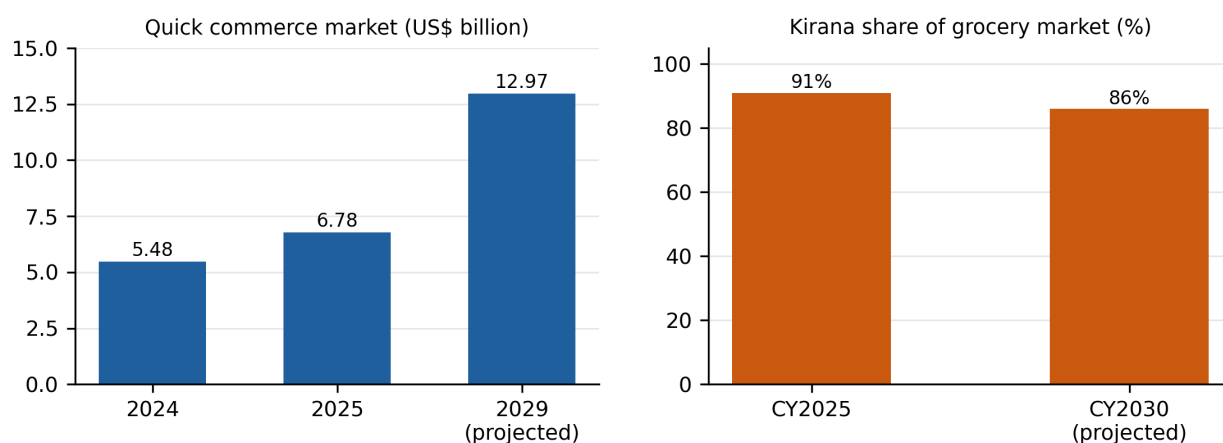
### 5.1 National scale-up

Table 2 reports the main national indicators, and Figure 2 shows the two trends that frame the debate. Quick commerce is growing quickly from a small base, while the kirana share of the grocery market is declining slowly from a very large one. Redseer Strategy Consultants (2026) estimates that kirana stores held about 91% of the grocery market in 2025 and will still hold about 86% in 2030. The aggregate picture is therefore one of gradual erosion, not collapse.

**Table 2.** Key national indicators of quick commerce and kirana retail

| Indicator                                          | Value             | Reference period |
|----------------------------------------------------|-------------------|------------------|
| Quick commerce market size                         | US\$5.48 billion  | 2024             |
| Quick commerce market size                         | US\$6.78 billion  | 2025             |
| Projected market size                              | US\$12.97 billion | 2029             |
| Compound annual growth, 2020–2024                  | 71.2%             | 2020–2024        |
| Dark stores projected across the sector            | 5,000–5,500       | 2025-26          |
| Kirana sales shifted to quick commerce             | US\$1.28 billion  | 2024             |
| Share of quick commerce sales drawn from kirana    | 21%               | 2024             |
| Quick commerce buyers who reduced kirana purchases | 46%               | October 2024     |
| Kirana share of the grocery market                 | About 91%         | 2025             |
| Projected kirana share of the grocery market       | About 86%         | 2030             |

Source: Research and Markets (2026); HSBC Global Research (2025); Datum Intelligence (2024); Redseer Strategy Consultants (2026).



**Figure 2.** Growth of quick commerce and the kirana share of the grocery market

Source: Authors' chart from Research and Markets (2026) and Redseer Strategy Consultants (2026), as reported in Table 2.

The aggregate conceals a concentrated effect. Datum Intelligence (2024), surveying 3,000 adults in ten cities, found that 46% of quick commerce buyers had reduced their purchases from kirana shops and that more than 82% had moved at least a quarter of their kirana spending to these platforms. The loss falls on stores in the localities where dark stores operate, and on the product categories those customers buy.

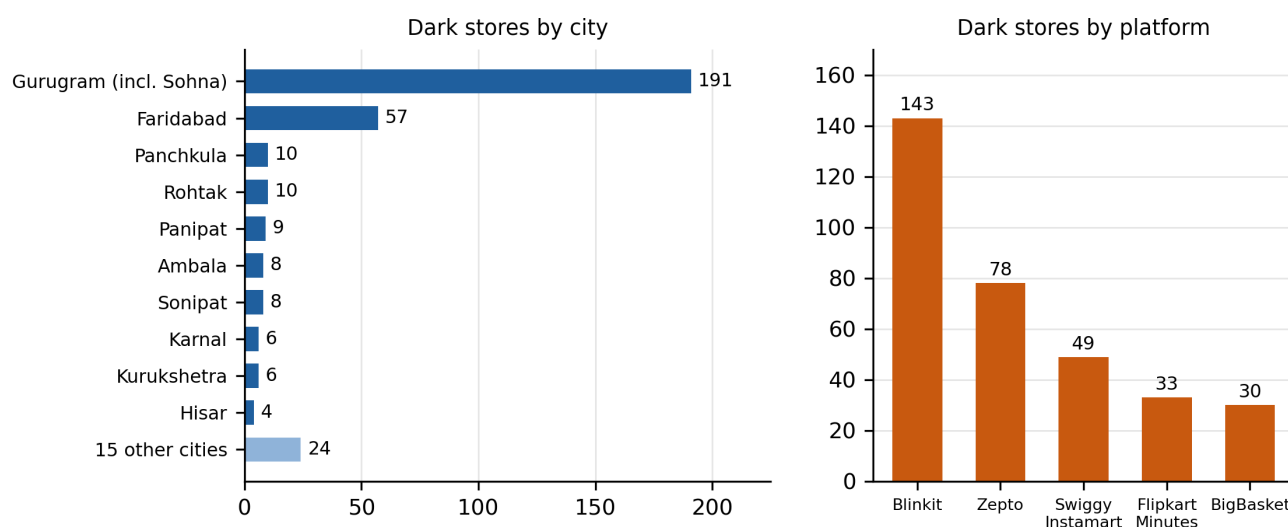
## 5.2 The spread of quick commerce in Haryana

Table 3 and Figure 3 present the distribution of dark stores in Haryana in July 2026. The state had 333 dark stores operated by five platforms in 25 cities across 19 of its 22 districts.

**Table 3.** Dark stores in Haryana by city and by platform, July 2026

| City                   | Dark stores | Share (%) | Platform         | Dark stores | Share (%) |
|------------------------|-------------|-----------|------------------|-------------|-----------|
| Gurugram (incl. Sohna) | 191         | 57.4      | Blinkit          | 143         | 42.9      |
| Faridabad              | 57          | 17.1      | Zepto            | 78          | 23.4      |
| Panchkula              | 10          | 3.0       | Swiggy Instamart | 49          | 14.7      |
| Rohtak                 | 10          | 3.0       | Flipkart Minutes | 33          | 9.9       |
| Panipat                | 9           | 2.7       | BigBasket        | 30          | 9.0       |
| Ambala                 | 8           | 2.4       |                  |             |           |
| Sonipat                | 8           | 2.4       |                  |             |           |
| Karnal                 | 6           | 1.8       |                  |             |           |
| Kurukshetra            | 6           | 1.8       |                  |             |           |
| Hisar                  | 4           | 1.2       |                  |             |           |
| 15 other cities        | 24          | 7.2       |                  |             |           |
| Total                  | 333         | 100.0     | Total            | 333         | 100.0     |

Source: QuickCommerceMap (2026); shares are the authors' calculations.



**Figure 3.** Distribution of dark stores in Haryana by city and by platform, July 2026

Two features stand out. The first is extreme spatial concentration. Gurugram alone accounts for 57.4% of the state's dark stores, and Gurugram and Faridabad together for 74.5%. The Herfindahl–Hirschman index of city shares is 0.36, a level that indicates a highly concentrated distribution. The second is that the format has nevertheless reached the district towns: eight cities outside the NCR metropolitan belt have between four and ten dark stores each, and fifteen smaller cities have one or two. Quick commerce in Haryana is no longer confined to Gurugram, but outside it the network is thin.

On this basis the state can be divided into four exposure tiers, shown in Table 4. The tiers are a framework for analysis and for sampling; they imply that a single statewide statement about the impact on kirana stores would be misleading.

**Table 4.** Exposure of kirana stores to quick commerce in Haryana: a four-tier framework

| Tier         | Areas                                                                   | Dark stores (share) | Expected effect on kirana stores                                                           |
|--------------|-------------------------------------------------------------------------|---------------------|--------------------------------------------------------------------------------------------|
| A. Saturated | Gurugram, Faridabad                                                     | 248 (74.5%)         | Direct competition in most residential localities; loss of packaged and premium categories |
| B. Emerging  | Panchkula, Rohtak, Panipat, Ambala, Sonipat, Karnal, Kurukshetra, Hisar | 61 (18.3%)          | Competition in central and newer residential areas; early loss of younger customers        |
| C. Marginal  | 15 smaller cities                                                       | 24 (7.2%)           | One or two dark stores; limited coverage and effect                                        |
| D. Unexposed | Three districts and rural Haryana                                       | None                | No direct effect; kirana remains the only channel                                          |

Source: Authors' classification based on QuickCommerceMap (2026).

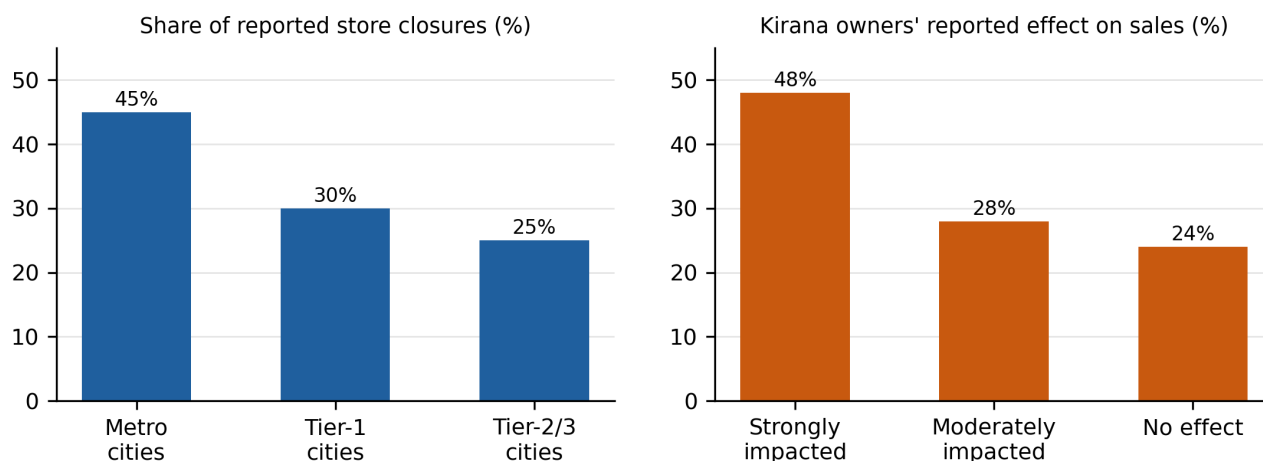
## 6. IMPACT ON BUSINESS PERFORMANCE

Direct measurement of kirana sales in Haryana is not available, and the assessment must rely on national estimates and surveys from comparable urban markets. Table 5 brings together the retailer-side indicators, and Figure 4 presents two of them.

**Table 5.** Retailer-side indicators of the effect of quick commerce on kirana stores

| Indicator                                                   | Value              | Source        |
|-------------------------------------------------------------|--------------------|---------------|
| Kirana stores reported closed in one year                   | About 2 lakh       | AICPDF (2024) |
| Share of closures in metro cities                           | 45% (about 90,000) | AICPDF (2024) |
| Share of closures in tier-1 cities                          | 30% (about 60,000) | AICPDF (2024) |
| Share of closures in tier-2 and tier-3 cities               | 25% (about 50,000) | AICPDF (2024) |
| Kirana owners reporting sales strongly impacted             | 48%                | Patil (2025)  |
| Kirana owners reporting moderate impact                     | 28%                | Patil (2025)  |
| Kirana owners reporting no effect                           | 24%                | Patil (2025)  |
| Variance in retailer disruption explained by consumer shift | 28–36%             | Bansal (2026) |

Source: Compiled by the authors; absolute numbers of closures are the authors' calculations from the reported shares.



**Figure 4.** Reported store closures by city tier and kirana owners' reported effect on sales

The most relevant evidence for Haryana is Bansal's (2026) study of Delhi NCR, which surveyed 400 quick commerce users and 300 kirana store owners. Consumer migration was significantly associated with three retailer outcomes: perceived decline in sales, reduced footfall and compressed profitability. The structural model explained 54% of the variation in consumer shift and between 28% and 36% of the variation in the disruption outcomes. Perceived convenience and perceived price advantage were the strongest predictors of switching. The finding that consumer shift explains about a third of the variation in retailer outcomes is important in both directions: the effect is real, and most of the variation in kirana performance is due to other factors, such as location, rent, competition from other shops and the retailer's own management.

Three conclusions about business performance follow. First, the effect is concentrated on particular categories. Packaged foods, beverages, snacks, personal care and household items, which carry the best margins for a kirana, are also the core of the quick commerce basket. Staples sold loose and low-value daily purchases are less affected. A store may therefore keep most of its customers while losing a disproportionate share of its profit. Second, the effect is concentrated on particular localities, which in Haryana means the gated societies and newer sectors of Gurugram and Faridabad. Third, the AICPDF closure figure should be read with caution. It is a trade-body estimate without a published method, it does not separate closures caused by quick commerce from the normal turnover of small shops, and it sits uneasily with the 91% market share reported for kirana stores a year later. It is best taken as evidence of distress among distributors and retailers in large cities, not as a census of closures.

## 7. RETAILERS' PERCEPTION AND RESPONSE

The available surveys indicate that kirana owners perceive quick commerce as a serious but uneven threat. In Patil's (2025) survey of kirana owners in Pune, about half said that their sales had been strongly affected and a similar proportion had observed that customers now preferred to shop online; a quarter reported no effect at all. The sample is small, at 25 owners in one city, but the division of opinion is itself informative. Perception depends on where the store is and whom it serves.

Retailers describe the threat less as a matter of speed than of price. Platforms offer discounts, funded by investors and by brands, that a small shop buying through distributors cannot match, and retailers regard this as unfair competition. This is the grievance that the AICPDF (2024) took to the government and the Competition Commission of India. The perception matters for behaviour: a retailer who believes that the contest is unfair is less likely to invest in the store and more likely to consider exit.

The response has been practical and incremental. Sixty per cent of the owners surveyed by Patil (2025) had adopted a combination of digital payments, ordering by WhatsApp or phone, and home delivery, and 48% offered home delivery regularly. Only 4% had built an application of their own, and 76% had no interest in moving the business online. Retailers have thus added services that extend the existing relationship with customers, while declining to imitate the platform model. Their stated needs are consistent with this: training in technology, finance and help with staffing.

## 8. CUSTOMER LOYALTY

Whether a kirana store keeps its customers depends on what kind of loyalty it has. Much of the repeat custom of a neighbourhood store is what Oliver (1999) would call loyalty of convenience: the customer returns because the shop is near. Quick commerce removes that advantage, since delivery to the door is nearer still. The loyalty that survives rests on things the platform does not provide. Table 6 sets out the main dimensions.

**Table 6.** Dimensions of customer loyalty and the relative position of kirana stores

| Loyalty dimension                | Position of the kirana store        | Vulnerability to quick commerce | Customers most affected              |
|----------------------------------|-------------------------------------|---------------------------------|--------------------------------------|
| Proximity and speed              | Formerly its main advantage         | High                            | Urban households ordering by app     |
| Price and offers                 | Weak; cannot match app discounts    | High                            | Price-conscious young customers      |
| Assortment                       | Limited by space                    | High                            | Buyers of premium and niche brands   |
| Credit and flexible payment      | Strong; based on personal knowledge | Low                             | Daily- and weekly-wage households    |
| Small-ticket and loose purchases | Strong; no minimum order            | Low                             | Low- and middle-income households    |
| Trust and personal service       | Strong; built over years            | Low to moderate                 | Older customers; long-term residents |

Source: Authors' analysis based on Datum Intelligence (2024), Redseer Strategy Consultants (2026), Sinha and Banerjee (2004) and Goswami and Mishra (2009).

The table explains why loyalty is being lost in some segments and retained in others. Datum Intelligence (2024) found that three-quarters of online grocery buyers had increased their unplanned purchases and that the average order exceeded ₹400. These are customers and baskets for which the kirana's remaining strengths count for little. By contrast, Redseer Strategy Consultants (2026) notes that kirana stores serve more than 230 million low- and middle-income households, many of which buy in amounts of ₹100 to ₹200 and depend on credit between wage payments. For these households the kirana is not one option among several; it is the channel that fits how they are paid and how they buy.

In Haryana this implies a divided market. In the high-income localities of Gurugram and Faridabad, customer loyalty to kirana stores is weakest and most of the packaged basket can be expected to move. In the older parts of the same cities, in district towns and in villages, the loyalty anchors remain strong. A kirana store's prospects therefore depend less on its own efficiency than on the composition of its neighbourhood.

## 9. DISCUSSION

The evidence suggests that quick commerce is disrupting kirana retail in Haryana from the top of the market downwards. It first takes the customers who are most profitable and least attached: higher-income, digitally active households buying branded goods. This matches the pattern described by Christensen (1997), with one difference. In the classic account the entrant starts with customers the incumbent does not value. Here the entrant has started with the customers the kirana values most, which is why the effect on margins is felt before the effect on footfall.

Three conditions determine how badly a kirana store is affected: whether dark stores serve its locality, whether its customers have the means and inclination to order by app, and whether the store offers something beyond proximity. In Tier A areas of Haryana the first two conditions are fully met, and survival depends on the third. In Tier B towns the network is still thin, and retailers have a period in which to prepare. In Tiers C and D the question does not yet arise.

There is also a question of sustainability on the other side. Quick commerce depends on discounts and on delivery economics that work only at high order density, and HSBC Global Research (2025) expects the pace of dark-store expansion to moderate once capacity has been built. Expansion into smaller towns of Haryana, where density is lower and order values smaller, may therefore be slower than the experience of Gurugram suggests. The kirana's cost structure, based on family labour and low rent, remains far leaner than that of any platform. The more likely outcome is coexistence with a changed division of labour, in which platforms take the urban packaged basket and kirana stores retain staples, credit sales and the mass market, and not the disappearance of either format.

## 10. POLICY RECOMMENDATIONS

- **Support digital adoption by retailers.** State and district industry centres should offer short training in digital payments, billing software, WhatsApp-based ordering and inventory control, which are the tools retailers have already shown willingness to adopt.
- **Enable collective buying.** Kirana stores should be helped to form purchasing groups or to use business-to-business sourcing platforms, so that they obtain trade terms closer to those available to large buyers.
- **Connect kirana stores to open networks.** Onboarding onto the Open Network for Digital Commerce and similar platforms would give small retailers an online presence without the cost of building their own applications.
- **Ensure fair competition.** Complaints of predatory pricing and of preferential supply by manufacturers should be examined by the competition authority on evidence, with clear rules on deep discounting.
- **Improve access to credit.** Working-capital loans under existing schemes for small traders should be made easier to obtain, since kirana stores finance the credit they extend to customers from their own funds.
- **Strengthen what cannot be copied.** Retailers should build on credit, personal service, phone orders and fresh and loose goods, where their advantage is durable, and should not attempt to compete on discounts.
- **Monitor the sector.** The state should collect regular data on the number, turnover and closure of small retail shops by district, so that policy rests on measurement and not on claims.

## 11. LIMITATIONS AND FUTURE RESEARCH

The study has four principal limitations. First, it relies on secondary data from sources that differ in period, definition and method, which limits comparison and rules out causal inference. Second, no direct measure of kirana sales, margins or closures exists for Haryana; the assessment of business performance is inferred from national estimates and from surveys in Delhi NCR and Pune. Third, the count of dark stores measures the presence of quick commerce, not its sales, and is taken from a private mapping source based on publicly observable information. Fourth, trade-body figures on closures come from an interested party and could not be verified independently.

Future research should conduct a primary survey of kirana retailers in Haryana, sampled across the four exposure tiers proposed in Table 4, with matched interviews of their customers. Retailers' perception, changes in sales, footfall and margins, adaptive measures and intention to continue should be measured with a structured instrument, and customer loyalty with established scales. A comparison of stores within and outside the delivery radius of a dark store in the same town would provide stronger evidence of effect than any comparison across cities.

## CONCLUSION

Quick commerce has changed the competitive position of kirana stores in Haryana, but not uniformly. Three-quarters of the state's dark stores are in Gurugram and Faridabad, and it is there that kirana stores are losing their most profitable customers and categories. In the district towns the format has arrived but is thin, and in rural Haryana it is absent. Retailers perceive the threat mainly as one of unequal pricing power, and they have responded by extending their existing services without adopting the platform model. Customer loyalty has proved weakest where it rested on proximity and strongest where it rests on credit, small purchases and personal trust. The central implication is that the future of the kirana store depends on defending and deepening these advantages, and on public measures that give small retailers fair terms of competition and the tools to adapt. With these in place, the kirana store is likely to remain the main channel for the majority of households in Haryana, even as quick commerce takes a growing share of the urban basket.

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