

Australia-India Business Engagement Program

Unlock New Market Opportunities through India's Retail
Evolution – Thursday, 5 February 2026



SUPPORTING PARTNERS



The Australia-India Business Engagement Program is supported by the Centre for Australia-India Relations. Australian Industry Group is proud to be a Centre for Australia-India Relations grant recipient.



Australian Industry Group acknowledges the Traditional Owners of Country throughout Australia and their continuing connection to land, waters and community. We pay our respects to their Cultures, Country and Elders past and present.



Housekeeping — Tips and Tricks of ZOOM

Chatham House Rule

Discussions will take place under the Chatham House Rule and the event will be recorded.

Zoom chat

Use Zoom chat — to ask questions or interact with the Trainers/Facilitators.

Zoom Q & A

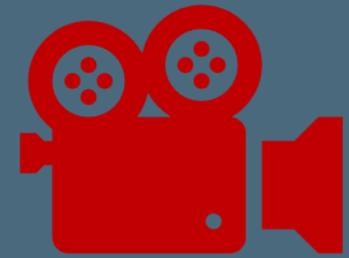
You can use the Q&A to ask questions, and we will try to answer them during the session.

Zoom screen sharing (including phone)

Occasionally we will use the screen sharing function in Zoom with our computers or phones. This will not require you to do anything but be attentive.

Slide Deck

A copy of the slide deck will be shared with those who registered.



**This session is
being recorded**



Introduction



Australian Industry Group

Australian Industry Group is the nation's largest and most experienced employer organisation representing traditional, innovative and emerging industry sectors.



Our Program Today

Introduction

Remarks from Centre for Australia-India Relations

Presentation from Todd Miller, Senior Trade Commissioner,
Austrade, Mumbai

Presentation from Pramodh Lakshminarayan, Austrade

Presentation from Sanjay Karkera, Logisteed India

Q & A



Australia-India Business Engagement Program Survey



- With the support of the Centre for Australia—India Relations, we are conducting a national business engagement survey to better understand the opportunities and challenges Australian businesses face when engaging with the India market.
- The insights gathered will help shape future support services, resources, and initiatives aimed at helping businesses make informed decisions about entering or expanding in India.
- Link to survey: <https://survey.aigroup.com.au/index.php/576214>

Use The Chat Box - Introduce Yourself

Who are you

What company are you from

What product/service are you currently exporting, planning to export, or are you intending to source goods from India?



Divya Skene

Head of Business Engagement

Centre for Australia-India Relations - DFAT



Divya Skene is a senior trade and business engagement professional with over two decades of experience advancing Australia's international business, investment, and economic relationships across the Indo-Pacific.

She is currently Head of Business Engagement at the Centre for Australia-India Relations, where she works to strengthen commercial links between Australian and Indian businesses, industry bodies, and institutions.



Australian Government



A NEW ROADMAP

FOR AUSTRALIA'S ECONOMIC
ENGAGEMENT WITH INDIA

A NEW ROADMAP

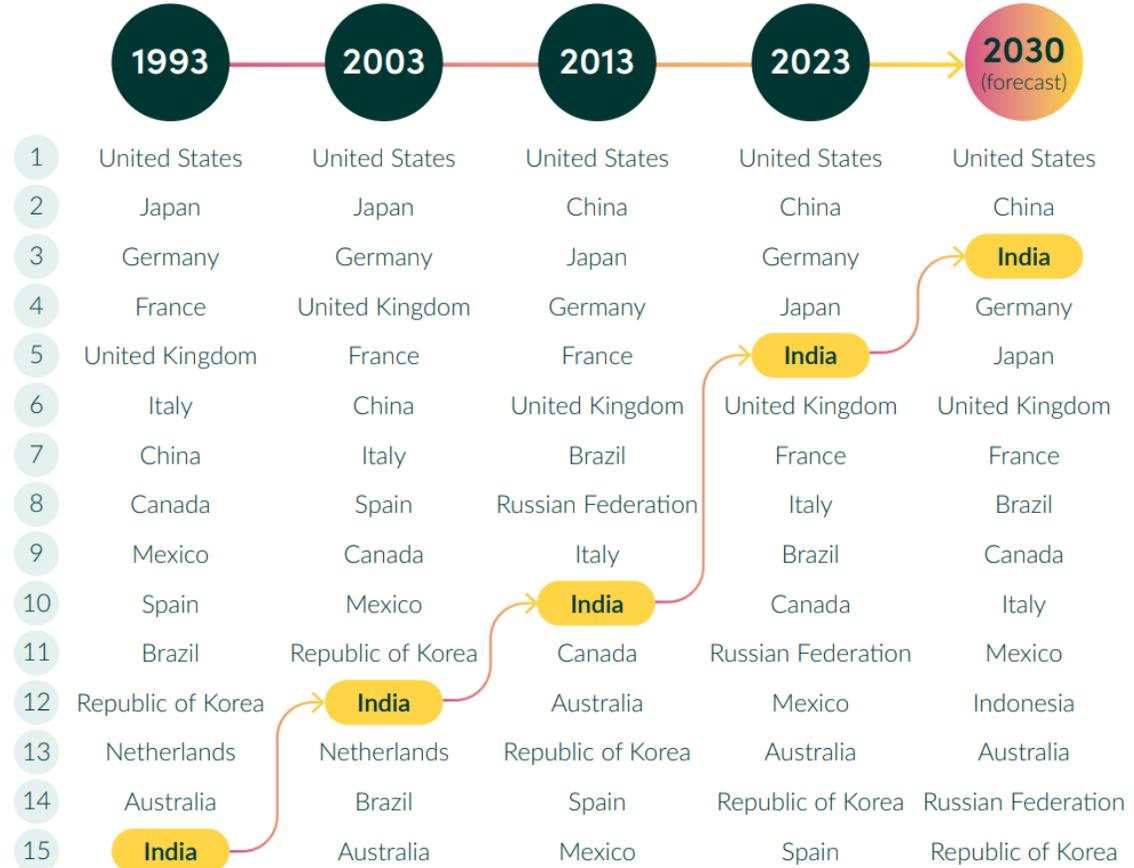
FOR AUSTRALIA'S ECONOMIC ENGAGEMENT WITH INDIA



Why India Matters

- India's fast-growing economy
- Highly complementary economies
- Strategic alignment
- Comprehensive Strategic Partner
- Imperative for diversification
- Fellow Indian Ocean country
- People-to-people links

India is rocketing up the GDP leaderboard



Source: International Monetary Fund (IMF), GDP current prices, World Economic Outlook, October 2024. DFAT forecast to 2030 utilised existing growth rate.

A NEW ROADMAP

FOR AUSTRALIA'S ECONOMIC
ENGAGEMENT WITH INDIA



'Superhighways' of economic growth: *sectors of significant potential*



Clean energy



Education & Skills



Agribusiness



Tourism

A NEW ROADMAP

FOR AUSTRALIA'S ECONOMIC
ENGAGEMENT WITH INDIA



Agribusiness



A NEW ROADMAP

FOR AUSTRALIA'S ECONOMIC
ENGAGEMENT WITH INDIA



'Superhighways' of economic growth: *sectors of significant potential*



Clean energy



Education & Skills



Agribusiness



Tourism

A NEW ROADMAP

FOR AUSTRALIA'S ECONOMIC
ENGAGEMENT WITH INDIA



Major economic roads: *Sectors of interest*



Sports, Culture
and the Arts



Investment



Technology
and IT



Resources
and METS



Defence
Industries



Space



Health

A NEW ROADMAP

FOR AUSTRALIA'S ECONOMIC
ENGAGEMENT WITH INDIA



The road ahead

- We still have more to do
- The Roadmap provides clear direction for accelerating growth in our trade ties



India Market Overview — Key Trends and Growth Drivers



Todd Miller
Trade & Investment Commissioner
Agribusiness, Food & Consumer,
South Asia

Todd Miller is the Trade and Investment Commissioner for Austrade South Asia, based in Mumbai, where he has recently commenced his posting. His portfolio covers agribusiness, food and beverage, and consumer goods, with a focus on strengthening engagement with India's retail ecosystem to grow the adoption and import of Australian products.

Previously, Todd was based in Saudi Arabia as Trade and Investment Commissioner for the Middle East, covering eight markets across the GCC. Todd was also the regional lead for Agribusiness, Food and Infrastructure sectors. He brings extensive global experience, having worked across every continent, including roles in the United States and the Middle East, and a long career with the Australian Government supporting trade and industry engagement.



Australian Government

Australian Trade and Investment Commission

Unlock New Market Opportunities through India's Retail Evolution

Webinar | 05 February 2026 | 03.00pm AEDT



Todd Miller

Trade Commissioner

Food & Agribusiness – South Asia

Australia-India Relationship

The bilateral relationship is at the highest point it's ever been. There are many converging factors that will see this relationship continue to deepen into the future.



SOURCE: Department of Prime Minister and Cabinet

DRIVING FACTORS



STRATEGIC CONVERGENCE

- Shared interest in peace, security, stability, and prosperity in the Indo-Pacific region
- Strengthened ties via engagement at multilateral fora such as the Quad, G20, and East Asia Summit



PEOPLE-TO-PEOPLE LINKS

- The Indian-Australian community is Australia's second-largest and fastest-growing overseas-born group
- Beyond diaspora, connections are forged via initiatives such as Centre for Australia-India Relations (CAIR)



GROWING ECONOMIC ROLE

- Australia and India's economies are highly complementary. Australia has the raw commodities and resources, as well as the skills and technologies that India needs
- New role for India as an investor into Australia



POLICY

- Australia's Economic Roadmap outlines the strongest opportunities as four Superhighways of Growth: Agribusiness, Education and Skills, Green Energy, and Tourism
- AUD \$300m invested in programs to advance the relationship

India at a Glance

Australia and India's economies are growing in ways that are complementary, creating a once-in-a-generation opportunity to benefit from – and contribute to – India's growth story.

FAST FACTS



DEMOGRAPHICS

- ~1.46bn population, the world's largest, with a consumer market of 400m+
- Its working-age population will continue growing, longer than the rest of Asia
- There are ~1m Australians of Indian ancestry



AUSTRALIAN CONNECTION

- Australia's 4th largest export market in 2023 (up from 6th in 2020)
- 5FY CAGR of 8.0% for Australian merchandise exports
- Largest source of skilled migrants, 2nd largest market for students (120k+)



INDIAN ECONOMY

- World's fastest growing major economy
- In June 2025, overtook Japan to become world's 4th largest economy by GDP
- 45m Indians have an advanced economy purchasing power annual household income of over \$55,000



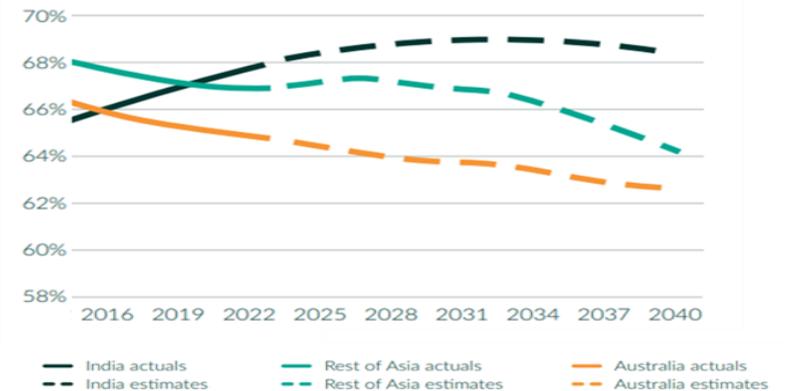
USEFUL INFORMATION

- Indian FY runs: April 1st to March 31st
- AUD \$1 = IDR ₹56.7 (July 2025)
- 90% of Australian goods exports by value will be tariff free by 2026

India has a fast-moving consumer goods market



And a growing working age population



SOURCE: A New Roadmap For Australia's Economic Engagement With India: Macrobond; DFAT calculations.

ECTA and CECA

As negotiations continue for an ambitious Comprehensive Economic Cooperation Agreement (CECA), many Australian goods are already entering India either duty-free or with reduced tariffs thanks to the Australia-India Economic Cooperation and Trade Agreement (ECTA).



CONTEXT

- **Signed in April 2022** to strengthen economic ties and accelerate bilateral trade
- Provides preferential market access, including **duty-free or reduced-duty access for many Australian goods**
- Key areas of engagement include **food, consumer products, and agricultural produce**
- Over 85% of Australian goods exports by value to India are now tariff free, **rising to 90% by January 2026**



RESULTS

- Bilateral trade increased more than 2x - from **AUD 18 billion to AUD 40 billion in 1 year**
- In the first 12 months since ECTA entered into force, **agriculture exports up 60 percent and industrial exports up 30 per cent** (excluding coal)
- Australian exporters have saved AUD \$30 billion in tariffs
- Australian importers have saved around \$225 million on goods from India



NEXT STEPS

- **Australia is working to conclude negotiations** for the Australia-India Comprehensive Economic Cooperation Agreement (CECA)
- **CECA will build upon ECTA outcomes** to capitalise on the potential for closer economic ties between Australia and India
- It aims to improve **market access for Australian food products that were not covered under the initial agreement**

Pramodh Lakshminarayan

Director, Trade and Investment - Austrade South Asia



- India's Modern retail environment — How traditional and digital retail coexist
- eCommerce & quick commerce — Opportunities in online shopping and ultra-fast delivery models



Pramodh Lakshminarayan

Director - Business Development

Food & Agribusiness – India

Looking Ahead

- Overview
- Modern Retail
- Digital Retail
- Key Players
- Phygital Retail
- Fast-Growing Consumer Sectors
- Market Readiness for Australian Brands
- Complexities Involved and Recommendation
- Practical Aspects to Consider for Entry & Scale



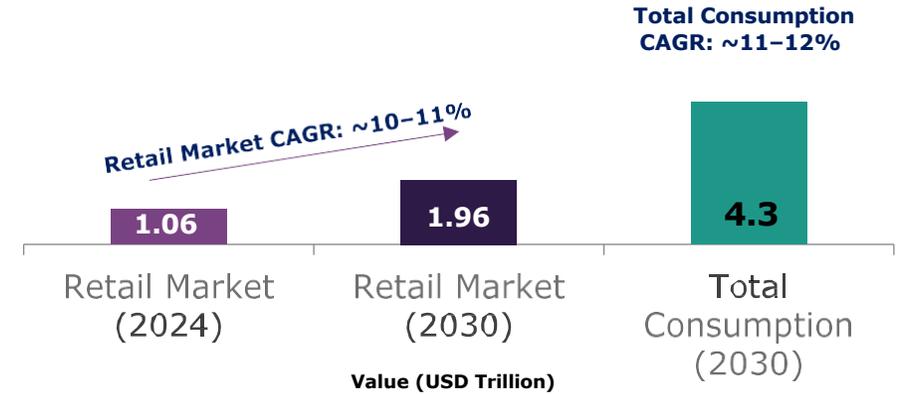
Overview

Key Trends

- ❖ Rising disposable income & consumer spend across age groups
- ❖ Growing brand consciousness — especially among Gen Z & millennials
- ❖ 2025: Gen Z accounted for 43% of consumption
- ❖ Shift from price-led to value-led purchases
- ❖ Emerging demand for quality, sustainability, and convenience

Growth Drivers

- ❖ Demographics — ~65% under 35 years
- ❖ Tech Adoption — 800M+ internet users
- ❖ Digital Payments — UPI and mobile wallets boom
- ❖ Retail Infrastructure Investment — malls, logistics, cold chain



Retail Sector Specifics - Consumer Spends

- ❖ 2013-23 - retail consumption grew at 7.2% CAGR; faster than China, the US and Germany
- ❖ Future Outlook: The number of individuals earning US\$ 10k+ annually is expected to nearly triple from 60 million in 2024 to 165 million by 2030
- ❖ Overall consumption and retail spending are forecast to grow by roughly 70-100 % from ~2024 to 2030.

Modern Retail



Traditional Retail (80%+ sales)

- ❖ "Kiranans" (local mom-n-pop stores)
- ❖ Wet markets
- ❖ Small format grocers



Modern Retail

- ❖ Supermarkets / hypermarkets
- ❖ Specialty stores
- ❖ Organised retail chains



Kiranans

- ❖ Currently, the first touch point for FMCG and daily needs
- ❖ Extremely localised customer relationships
- ❖ Future Role: Micro-fulfillment centers for Quick Commerce delivery

Digital Retail



- ❖ High smartphone & internet penetration
- ❖ Affordable mobile data
- ❖ Trust in online payments
- ❖ Large-scale adoption of Unified Payments Interface (UPI)
- ❖ Government initiatives such as Govt. e-Marketplace (GeM) and Open Network for Digital Commerce (ONDC)



- ❖ ~270 to 280 million active online shoppers in 2024-25; to reach 500 million by 2030
- ❖ FY25 – Total GMV of India's e-commerce sector ~ US\$ 14 billion; 17–22% YoY growth
- ❖ GMV projected to rise over 18% YoY; ~US\$ 170 billion by 2030
- ❖ B2B online marketplace ~ US\$ 200 billion opportunity by 2030



- ❖ Quick commerce - Focus on 10–30minute delivery of groceries & daily essentials
- ❖ ~10% of e-retail and growing rapidly; projection: ~40%+ CAGR, ~ US\$ 10 billion+ by 2030
- ❖ Hyper-local model uses dark stores (micro-warehouses) for rapid fulfillment; connects kiranas & cloud kitchens
- ❖ Creating new consumer habits

Key Players



Phygital Retail

What is Phygital?

A blended experience where digital and physical retail form a unified journey:

- ❖ Click-and-collect (purchase online and collect at stores)
- ❖ Virtual try-ons (on Fashion websites)
- ❖ Store inventory visible online
- ❖ Self-checkout & QR payments

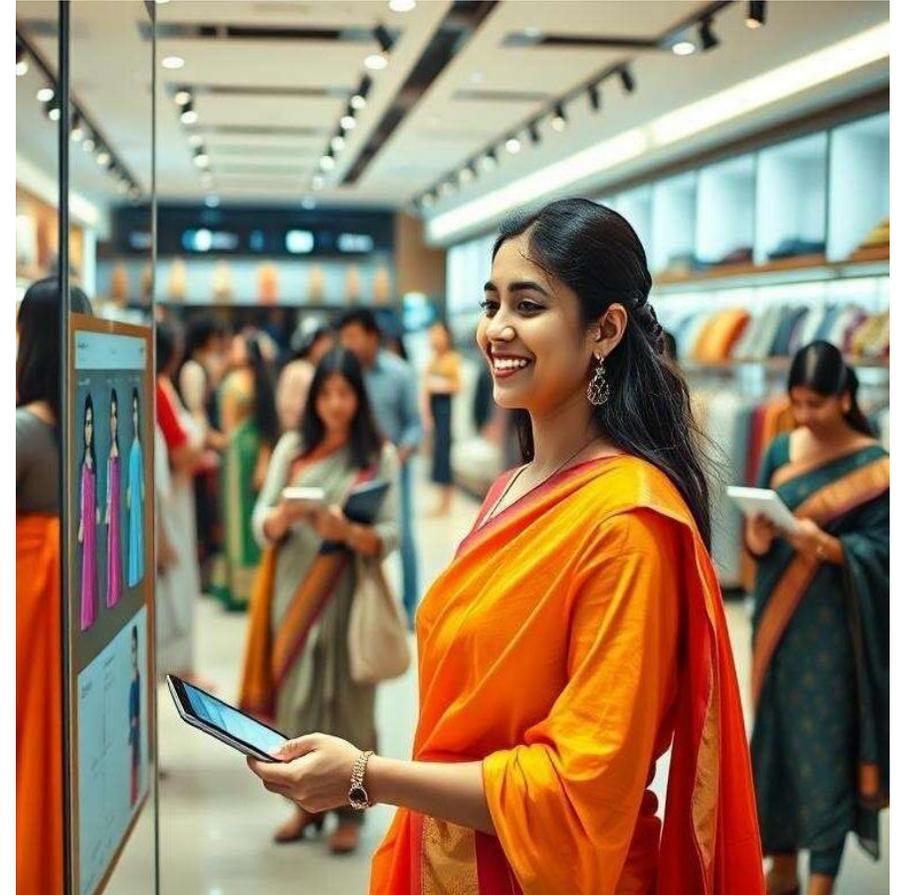
Why Phygital is Taking Off in India

- ❖ Consumers seek convenience + experience
- ❖ Retailer competition — not just online vs offline

Consumers want seamless Fulfilment

Brands active across both worlds outperform

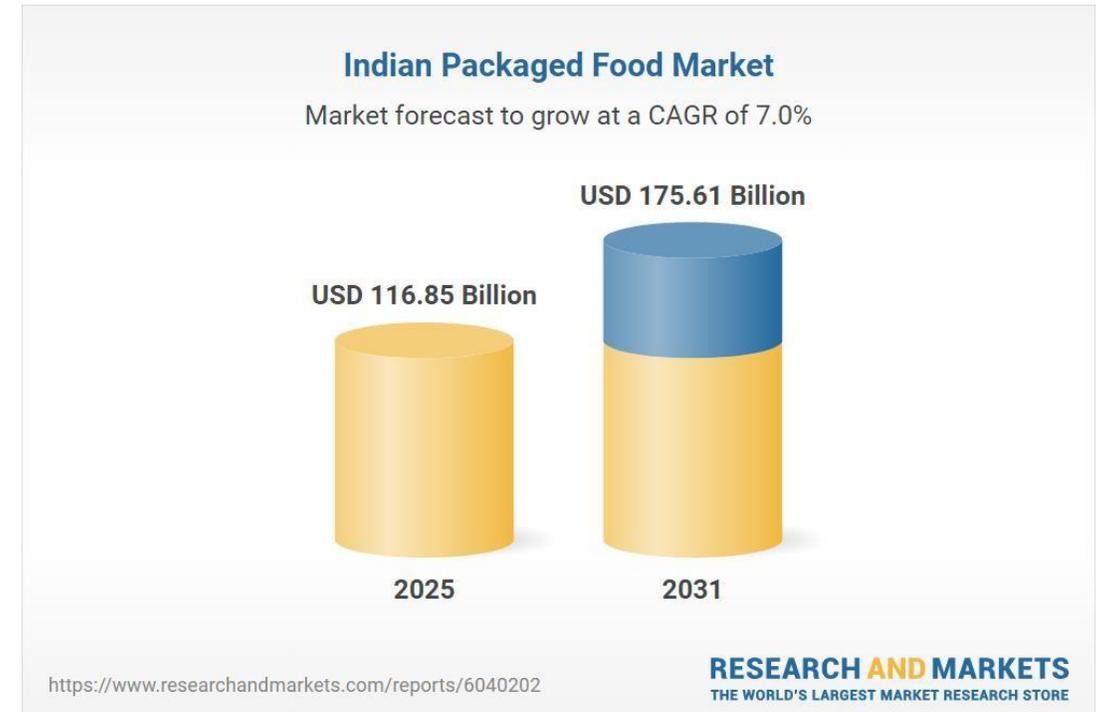
Phygital retail: the new normal in Indian markets



Fast Growing Consumer Sector – Packaged Food

Trends

- ❖ Post-pandemic , growing demand for healthy, clean-label, ready-to-eat, Organic and functional foods gaining traction.
- ❖ Lifestyle changes and global travellers are leading increasing demand for imported high quality premium F&B products
- ❖ Taste + convenience driving purchases
- ❖ The online grocery segment growing at 30%+ CAGR
- ❖ Rising competition from local and international brands
- ❖ Sustainable packaging is a significant trend



Packaged Food – Market Segmentation

By Product Type

- ❖ **Confectionery & Chocolates:** High demand for premium, imported chocolates
- ❖ **Snacks & Savory:** International snacks, imported nuts, and premium savory products
- ❖ **Beverages:** Functional drinks, high-end teas, coffee, and international fruit juices
- ❖ **Dairy:** Premium cheese, butter, and yogurt
- ❖ **Condiments & Sauces:** Olive oil, pasta sauces, dips, and exotic spices
- ❖ **Health & Organic:** Plant-based, gluten-free, and organic imported health foods

By Price Point

- ❖ **Premium/Gourmet:** High-end, imported products
- ❖ **Mid-Range (Mass market to Premium) :** Accessible imported brands found in modern retail

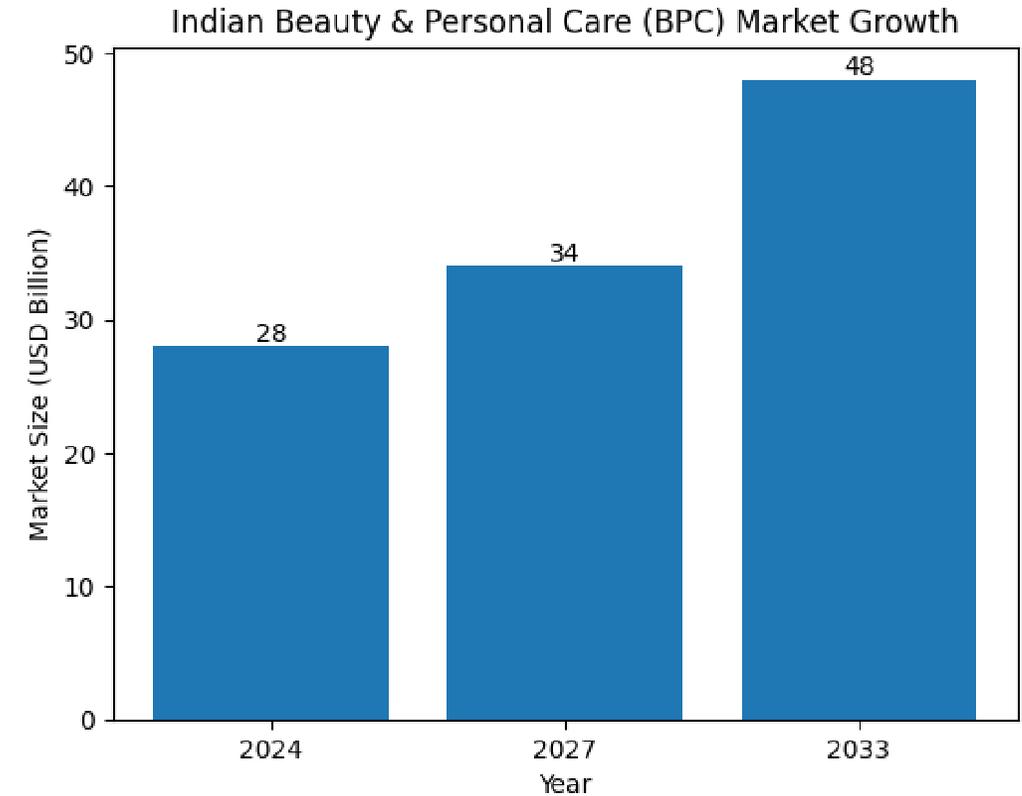
By Distribution Channel

- ❖ **Modern Trade:** Supermarkets (Reliance Fresh, DMart) and premium retail outlets (Nature's Basket)
- ❖ **E-Commerce:** Significant growth through platforms like Amazon, BigBasket, and Zepto
- ❖ **HORECA:** Hotels, Restaurants, and Cafes (high consumption of imported ingredients)

Fast Growing Consumer Sector – Beauty & Personal Care

Trends

- Personal Care: Largest segment - \$15.31 billion
- Skincare: \$10.93 billion (outpacing the broader market with a CAGR of 13–15%.)
- Organic / natural / clean beauty: 42% share of the total market in 2025
- Distribution: Online retail is the major growth engine; with 30% share in 2025 and expected growth of over 10% annually
- Category Per Capita Spending: ~ \$23.44 in 2026



Beauty & Personal Care – Sector Overview

Retail Stores



Online Players



Recent News

Myntra Adds 40+ Global Brands in 2025 as Non-Metros Power 45% Demand

Published On: 17th, 18 Dec 2025, 04:05 pm

Indiaretailer Bureau

- 450+ International Brands
- 40+ New International Brands added in 2025
- Nearly 45% of customer demand for International brands on Myntra now comes from non-metro markets

Nykaa incorporates subsidiary for beauty and personal care

Nykaa will hold 100 percent ownership in the subsidiary, and the incorporation does not fall under related party transactions, the company said

By STORYBOARD18 | March 12, 2025, 22:48:56 IST

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Home > Industry news > Purple eyed by private...

Purple eyed by private equity giants as India's beauty market surges

21 Jan 2026 | By Ela Jade Unal

Key takeaways

- Indian online beauty brand Purple attracts interest from private equity giants like KKR, TPG Growth, and ChrysalisCapital.
- India's beauty and personal care market is forecasted to reach US\$34 billion by 2028, with e-commerce growth driving industry trends.
- L'Oréal is among the brands planning to increase business in India.

Fast Growing Consumer Sector – Health & Nutraceuticals

Trends

- ❖ Pandemic accelerated focus on immunity & well-being
- ❖ Indian consumer increasingly adopting supplements
- ❖ Total Market Size (2024/25): Estimated between USD 15 billion and USD 18 billion (with some broader estimates for nutritional supplements placing it as high as USD 35-42 billion)
- ❖ Growth Rate: The market is witnessing a rapid expansion with a CAGR of over 13%–15%
- ❖ Functional foods and beverages (approx. 60% share) and dietary supplements (approx. 40% share) are the major drivers
- ❖ Segment Highlights: The sports nutrition segment is expected to experience high growth due to increased fitness awareness



Market Readiness for Australian Brands

What Makes Australian Brands Attractive

- ❖ Clean, high-quality products
- ❖ Trusted standards — especially in food & wellness
- ❖ Unique design & premium positioning



Opportunity - Sweet Spots

- ❖ Functional foods
- ❖ Nutraceuticals & supplements
- ❖ Vegan / Organic food and snacks
- ❖ Healthy Beverages
- ❖ Clean Beauty & Skincare (Tariff on HSN codes 3304 & 3305 slashed to 0)
- ❖ Sports & fitness gear



Jurlique



*Brand Australia is well known & trusted
Brands from Australia are not recognised*

Complexities Involved & Recommendation

Compliances & Regulations

- ❖ BIS/ FSSAI / CDSCO – Regulatory Authorities
- ❖ Processes are cumbersome; need local representative

Need for an Indian Representative – Importer/ IOR / Official Partner / Indian Entity

- ❖ Law mandates that goods cannot be imported /sold unless you have an Indian Bank Account and Indian GST number registered
- ❖ Processes to open Indian entity on your own can be cumbersome and you need local partners to hold Majority 51% stake
- ❖ Ecom platforms and modern retailers have close links with importers / importers on record
- ❖ Tripartite business arrangement in place
- ❖ Turnkey ecommerce solution providers can provide complete GTM solutions starting from registration to importing / IOR and distribution

Recommended Approach

- ❖ You need to be in for the long haul
- ❖ You need to be committed to for a minimum of three to five years
- ❖ Digital marketing investments are expected and required
- ❖ You need to own your brand in the market

Practical Steps to Consider for Entry & Scale

Define Market Entry Strategy

- ❖ Evaluate direct export vs marketplace vs JV/distribution
- ❖ Start with stronger categories (FMCG, wellness, beauty, fashion)

Market Research

- ❖ Consumer preferences by region
- ❖ Regulations, labelling & product adaptation

Channel Mix Strategy

- ❖ Modern trade + Ecommerce platforms

Localisation

- ❖ Tailor pricing, language & packaging

Marketing & Brand Positioning

- ❖ Use local social media
- ❖ Festive campaigns & influencer collaborations

Most Important

You need to connect and work with the right people.

Relationships are important.

Nothing comes close to first-hand market experience.

Visit India. Meet the right people.

Reach Out

Todd Miller

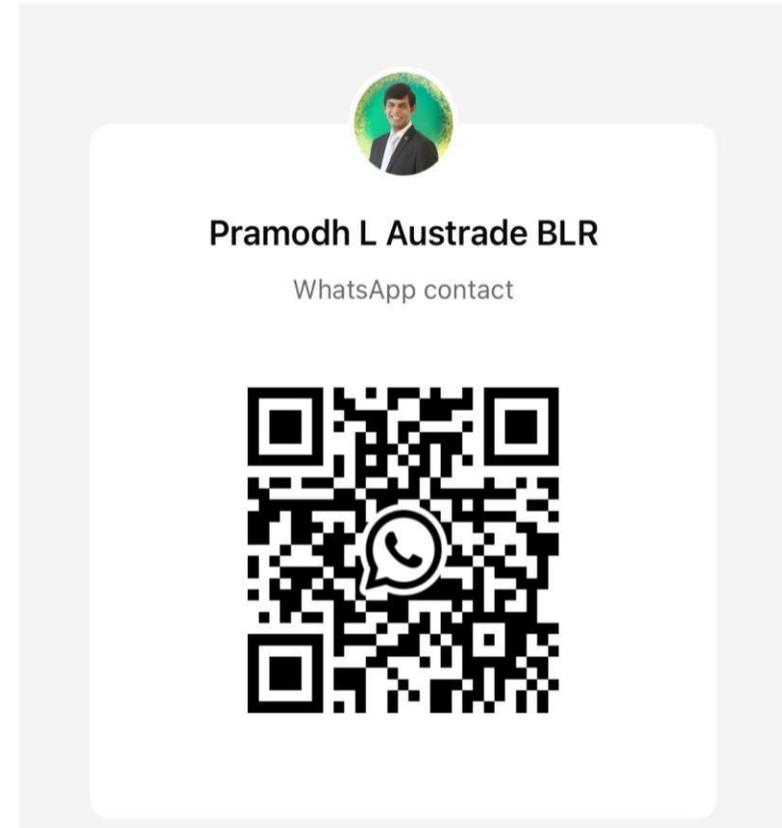
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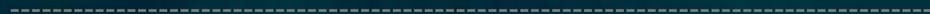
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India's Retail, E-commerce & Logistics Landscape

Growth Drivers - Structure Shifts - Future Opportunities



Sanjay Karkera
AVP — Contract Logistics & Logistics Engineering
Logisteed India Pvt Ltd (formerly Flyjac Logistics)



India's Retail, E-commerce & Logistics Landscape

Growth Drivers | Structural Shifts | Future Opportunities

Sanjay Karkera

AVP – Contract Logistics & Logistics Engineering

LOGISTEED India Pvt. Ltd. (formerly known as Flyjac Logistics India Pvt. Ltd.)

25+ years of leadership experience in supply chain and 3PL operations



ALPS LOGISTICS CO., LTD.



YOUR TRUSTED LEADING INTEGRATED LOGISTICS PARTNER



Integrating Value Chains



In-step with the times, A Step Forward in Future



Technology Enables Solutions



OVERVIEW

LOGISTEED

Flyjac Logistics Pvt. Ltd. (India, UAE & Qatar)



Employees
(As on 31st Mar'25)
56,227+

Employees
(As on 31st Mar'25)
4790+



Revenue (2024–2025)
₹52,134 Crore INR
\$6.1 Billion USD

Revenue (2024–2025)
₹1,447 Crore INR
\$171.1 Million USD



Reach
Companies: 122
Global Offices: 540

Reach
Offices: 32

5000 Customer Relationships in India

OUR PHILOSOPHY

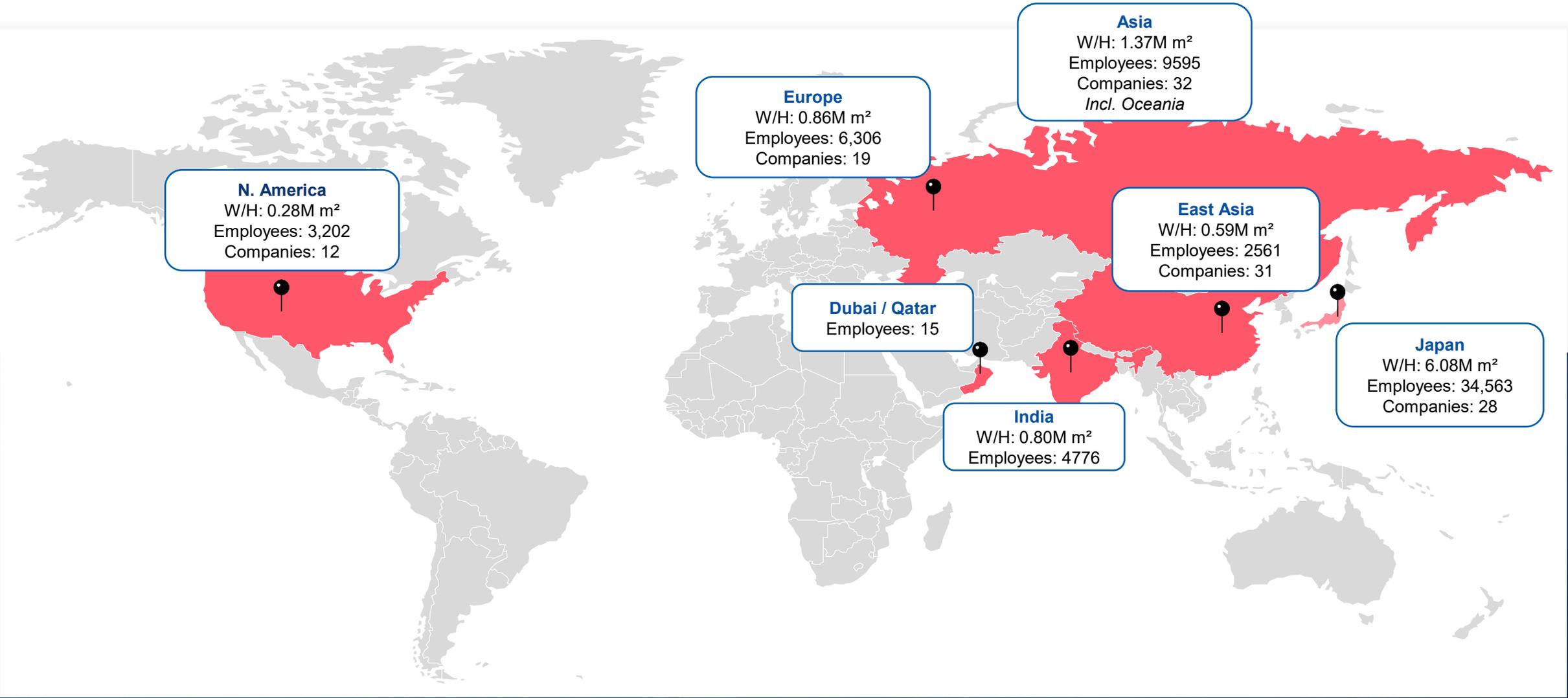
Customer Delight
Self Development
Social Welfare.



OUR MISSION

- To be a partner of our customers in building a seamless value chain.
- To create opportunities for self-development and excellence.
- To empower and enroll towards social and spiritual development.
- To build care and competence in networking, communication & personalized service.

LOGISTEED NETWORK



INDIAN RETAIL & E-COMMERCE LANDSCAPE



Market

- One of the **largest retail markets globally**
- **Retail:** US\$ 1.4T (~10% of GDP)
- **E-commerce:** US\$ 150B (~10-12% of retail, ~3-4% GDP)



Formats

- **25% organized** and 75% unorganized
- **Offline:** Kirana stores, malls, local trade
- **Online:** Marketplaces, D2C brands, quick commerce
- **Share of space** ~7% ecommerce (0.83 million sq. meter)



Drivers

- Rising digital & mobile penetration
- Retail + e-commerce synergy
- Business model innovation
- Consumer behaviour & demographic trends
- Tech & AI adoption
- Government policies

E-COMMERCE & RETAIL DYNAMICS



Retail US\$ ~2.5T
E-commerce US\$3.5B

Projected market size by 2030



Tier II & III Growth

Next wave of consumption



~ 85% UPI Adoption

Digital payments dominance



AI Personalisation

Next-gen retail engines



3PL – Backbone of Retail & E-commerce



Warehousing & storage

- General warehousing
- Multi-client warehousing
- Temp controlled/cold-chain
- Automated warehousing
- Bulk & zone storage

Retail: store replenishment
E-com: Fulfilment center

Fulfilment service

- Order picking, packing
- Kitting, assembly
- Customized packaging
- Cross docking
- Sort centers
- Omni-channel

Retail: bulk store
E-com: direct to customer orders

Technology & analytics

- WMS
- TMS
- AI/ML forecasting
- Customer portal & dashboard
- Data reporting & KPIs

Retail & E-com: supply chain visibility & efficiency

Transportation & delivery

- Last-mile delivery
- Multi-modal transport
- Dedicated fleet services
- Route optimization & scheduling
- Urban & Rural reach

Retail: supply to stores
E-com: customer delivery

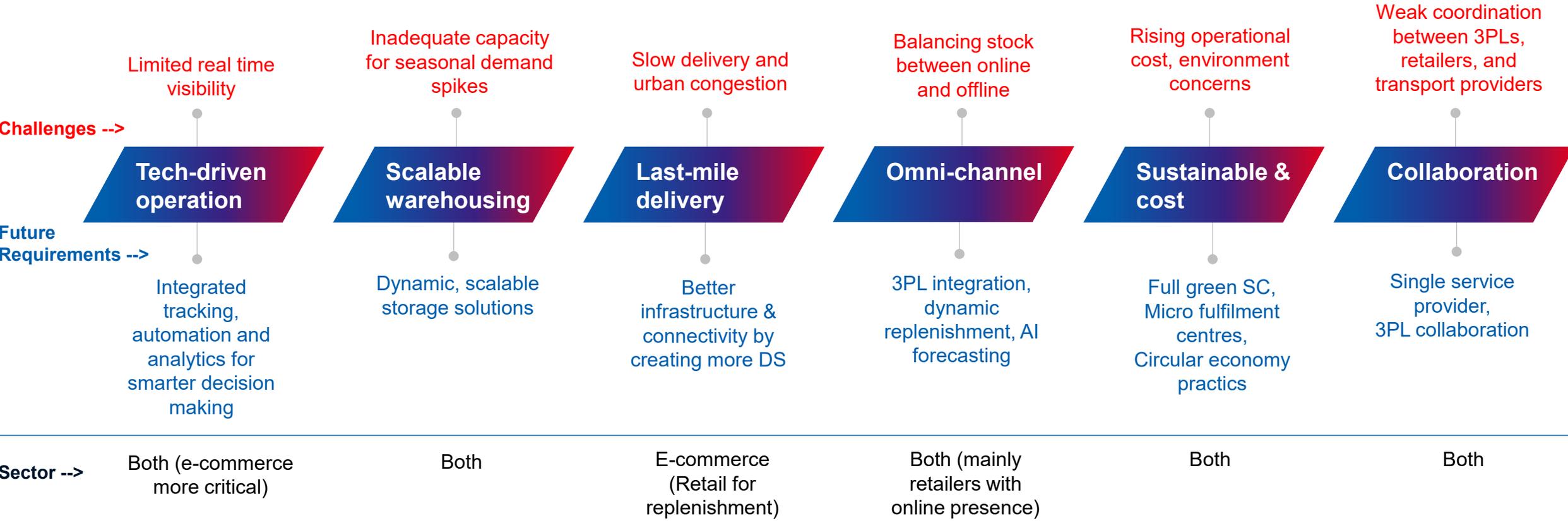
Reverse Logistics & returns

- Returns management
- Refurbishment & repackaging
- Recycling & disposal
- Warranty & replacement

Retail: defective products
E-com: high volume returns

India's logistics ecosystem is built for high volume, high SKU complexity, and rapid turnaround

RETAIL & ECOMMERCE CHALLENGES & FUTURE REQUIREMENTS



Consumption is moving towards **branded, experiential, and omni-channel formats**

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Connect with us
Thank you, Sanjay Karkera



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<https://flyjaclogistics.com>

An organization with which everyone loves to be associated

Questions & Next Step?

Stay Updated:

Register to receive updates on future events and activities.

<https://www.aigroup.com.au/services-and-advice/business-improvement/australia-india-business-engagement-program/#block-48873>

Share Your Feedback:

We'd love to hear your thoughts to help us improve.

Complete the survey:

<https://www.surveymonkey.com/r/AIBEP05Feb26>

Contact:

Tel: 1300 776 063 or E: big@australianindustrygroup.com.au

Share Your Feedback
Webinar – India Retail 5 Feb
2026





Australia India Business Engagement Program

E: big@australianindustrygroup.com.au