



WIDE
SELECTION



LOW
PRICES



VERIFIED
SELLER



INSPECTED
VEHICLE

www.droom.in

info@droom.in

www.droom.in/app

www.facebook.com/droom.in

droom

YELLOW

BOOK
2020

Data Book on India's Economy, Automobile Industry & Internet Market



ABOUT DROOM

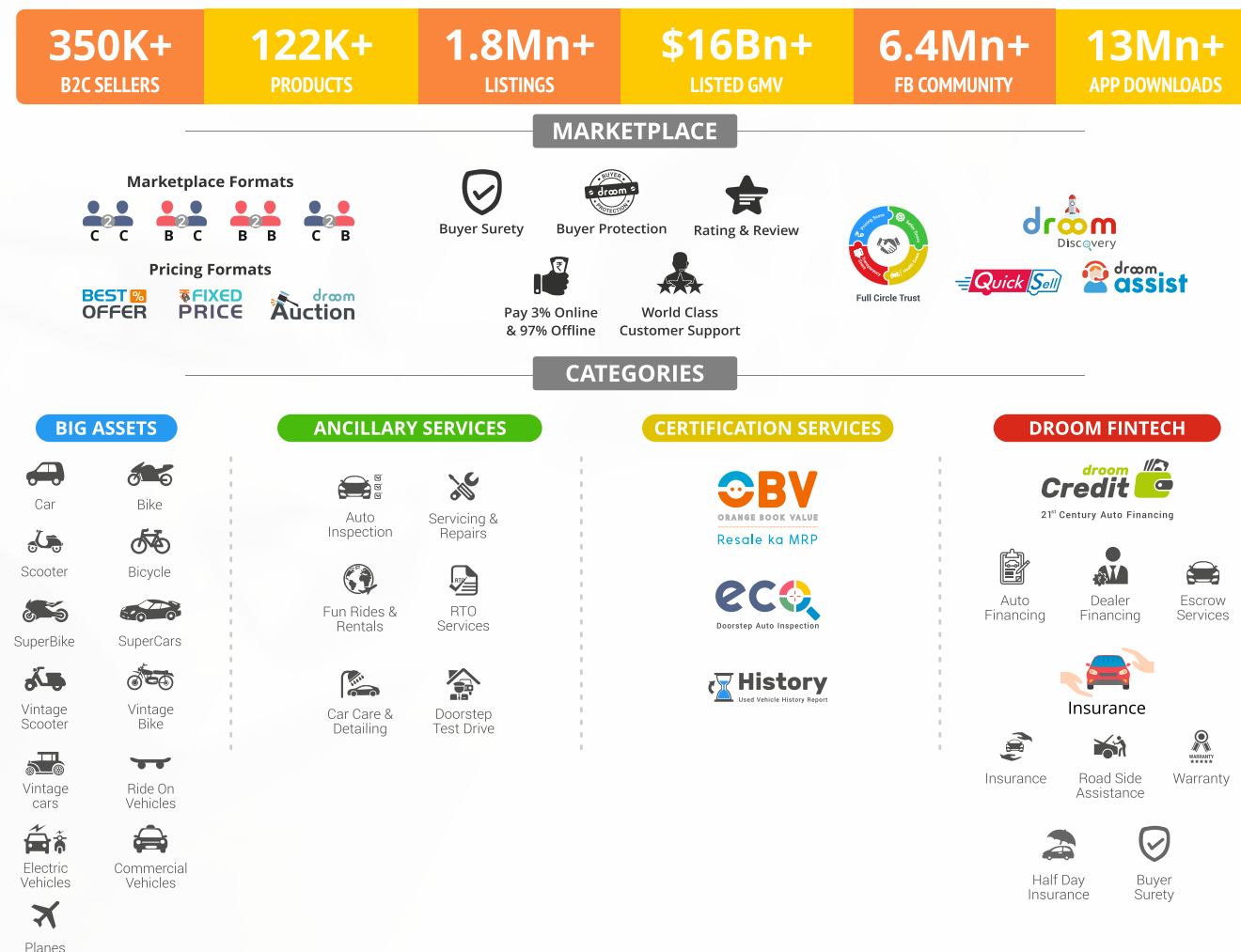
Droom is an AI and data science-driven online transactional platform, which offers 21st century experience in buying and selling of used and new automobiles in India and other emerging markets. Droom has built an entire eco-system around used automobiles for the digital economy, including Orange Book Value (used vehicle pricing engine), Eco (1,000+ points vehicle inspection), History (history records for used vehicles), Discovery (dozens of pre-buying research tools) and Droom Credit (India's first and only marketplace for used auto loan and dealer financing). Droom caters to individual buyers and sellers, dealers and large enterprise for not only buying and selling but also manages the entire life cycle and all automobile ancillary services.

Droom has four marketplace formats i.e. B2C, C2C, C2B and B2B, and three pricing formats - Fixed Price, Best Offer and Auction. The platform offers a wide range of categories from bicycle to plane and all automobile services such as Warranty, RSA, Insurance and Auto Loan.

With 80% market share of the automobile transactions online. Droom is India's largest automobile platform online and 4th largest E-Commerce company. Besides, India Droom is available in Singapore, Thailand and Malaysia. While, OBV is available in 38 countries globally, making OBV world's number one benchmark pricing engine.

The company is currently generating \$1.1 Billion in annualized GMV and growing at a rate of 100% Y/Y. Droom has presence in 1,032+ cities across India (India's largest hyper-local marketplace), 350K+ auto dealers (largest auto dealer platform in World), 28 Million+ monthly visitors, nearly 13 Million+ app downloads and 6.4 Million+ Facebook followers.

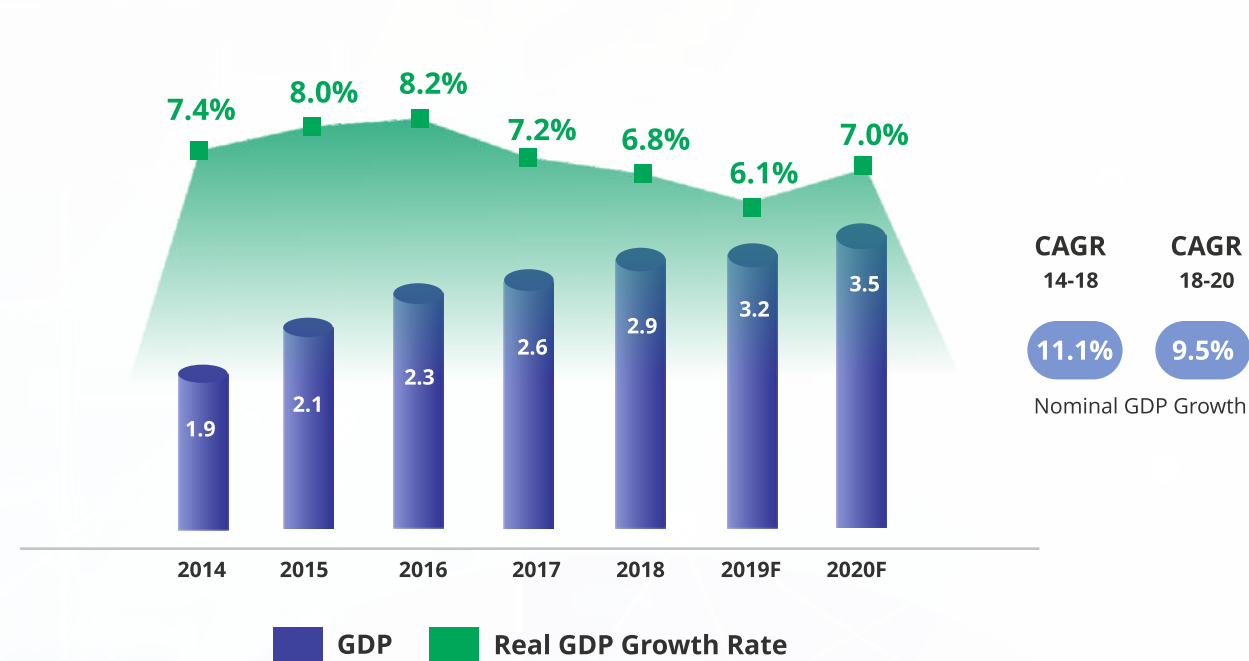
Droom's India headquarter is in Gurugram with a team size of 458+. Droom is a Singapore Holding Company with subsidiaries in India and the United States. The company has so far raised close to \$125 Million dollars over six rounds of funding. Some of the prominent investors are **Lightbox, Beenext, Beenos, Digital Garage, Toyota Tsusho Corporation, and Integrated Assets Management.**



www.droom.in info@droom.in
www.droom.in/app www.facebook.com/droom.in

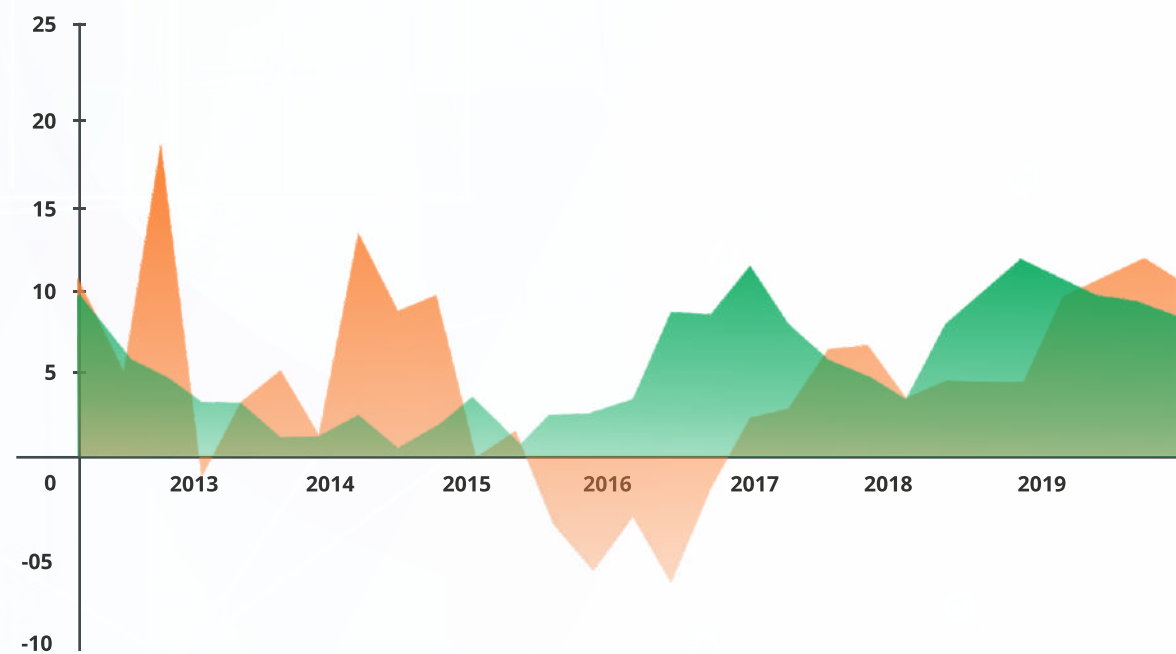


GDP & Real GDP Growth Rate



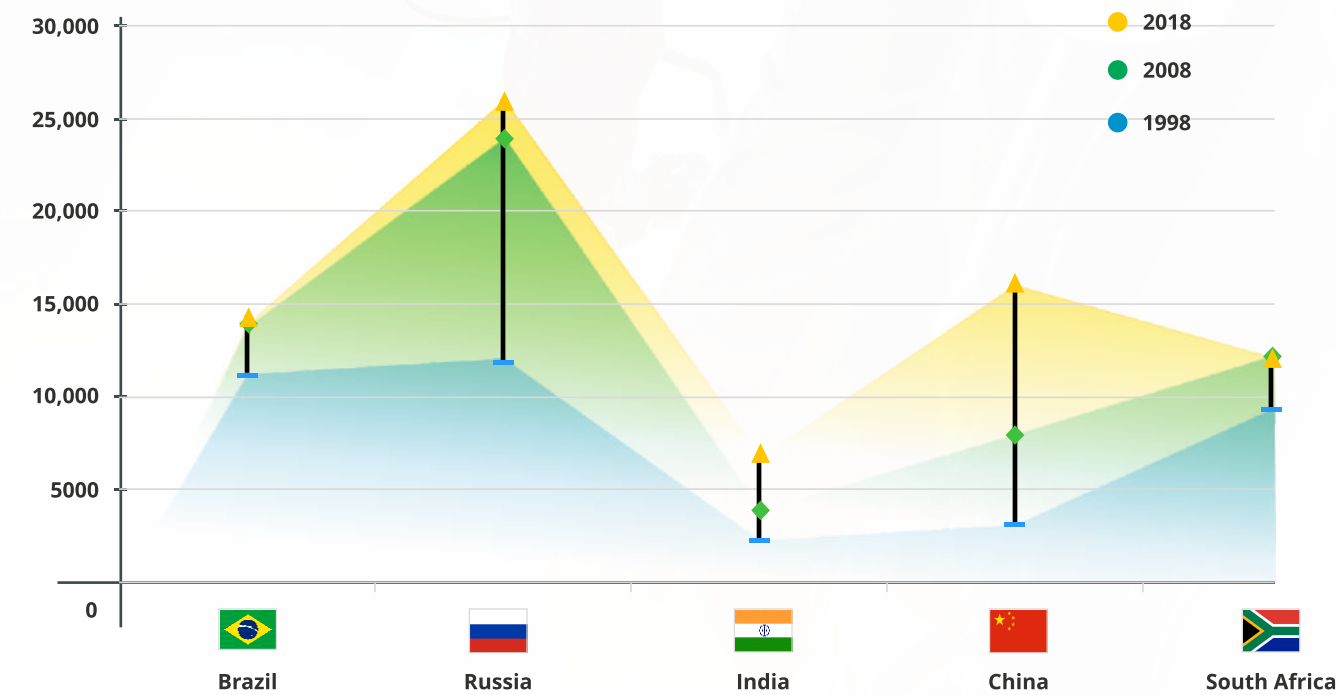
Note: 1) GDP, nominal value in USD, constant exchange rates, 2) Data refers to fiscal years starting in April
Source: Droom Yellow Book, OECD, IMF

Investment and export growth (y-o-y %)



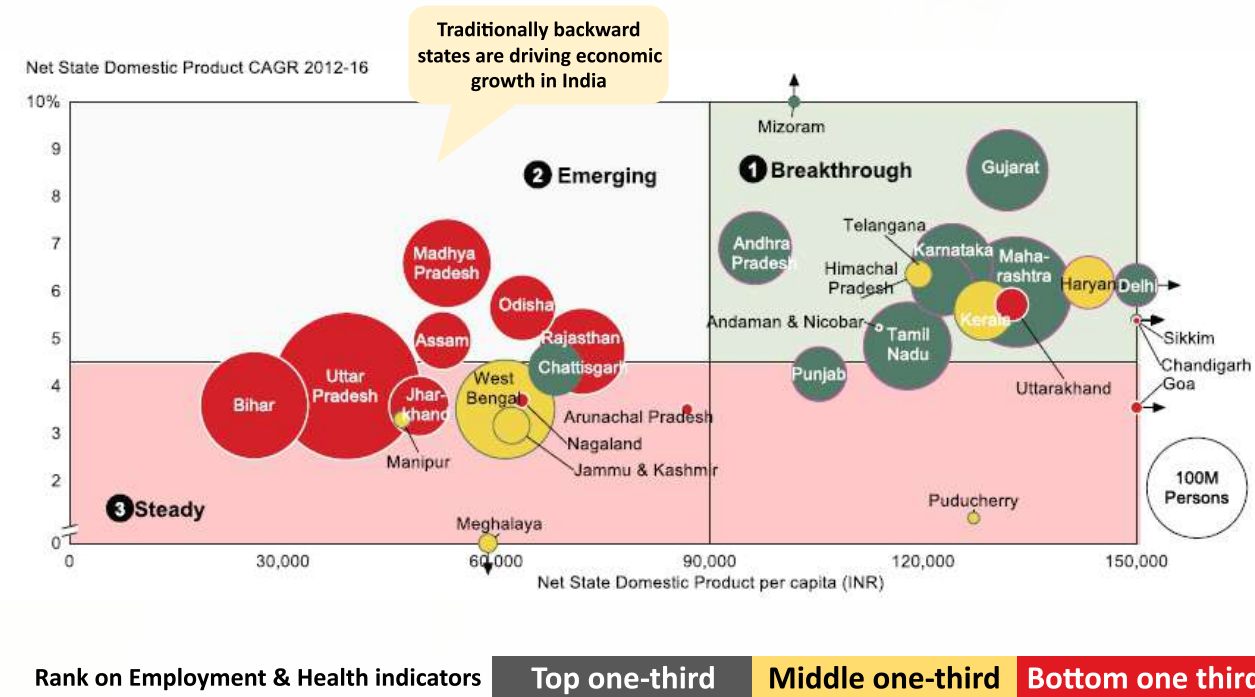
Note: 1) Data refers to fiscal years starting in April
Source: Droom Yellow Book, OECD

GDP per capita (\$)



Note: 1) 2010 USD, constant PPP-adjusted exchange rates
Source: Droom Yellow Book, IMF

State archetypes as per GDP per capita, GDP growth and human development

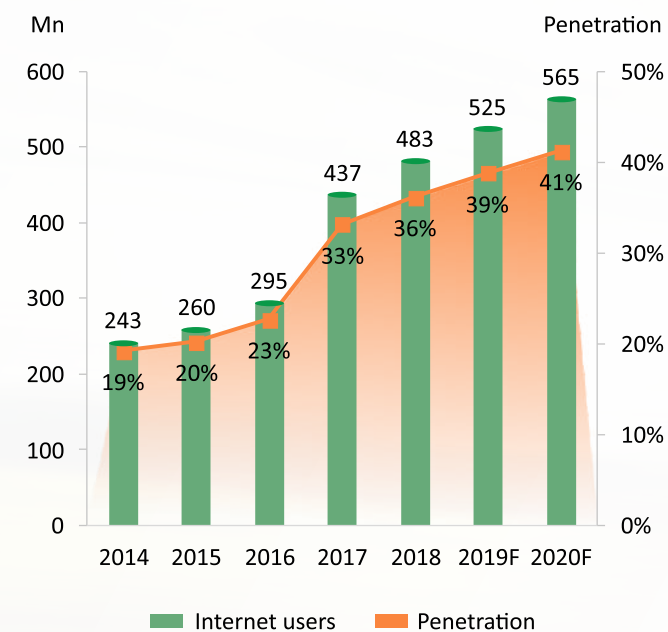


Note: 1) 2010 USD, constant PPP-adjusted exchange rates
Source: Droom Yellow Book, WEF, Bain

INTERNET LANDSCAPE

India has 2nd largest internet user base

Internet users & Penetration¹



E-commerce users (Mn)

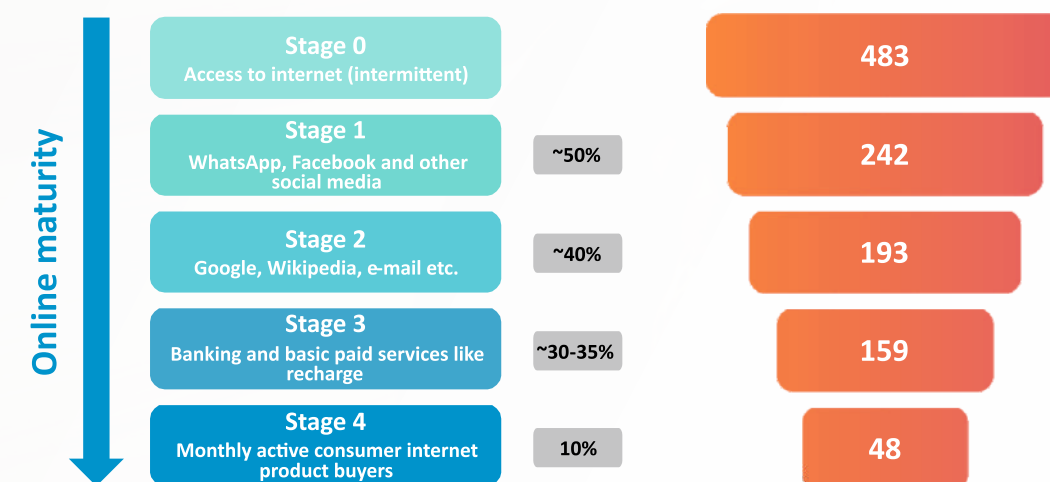


Note: 1) As % of population
Source: Droom Yellow Book, Statista, Mary Meeker

Majority of Indian internet users are already using some online services

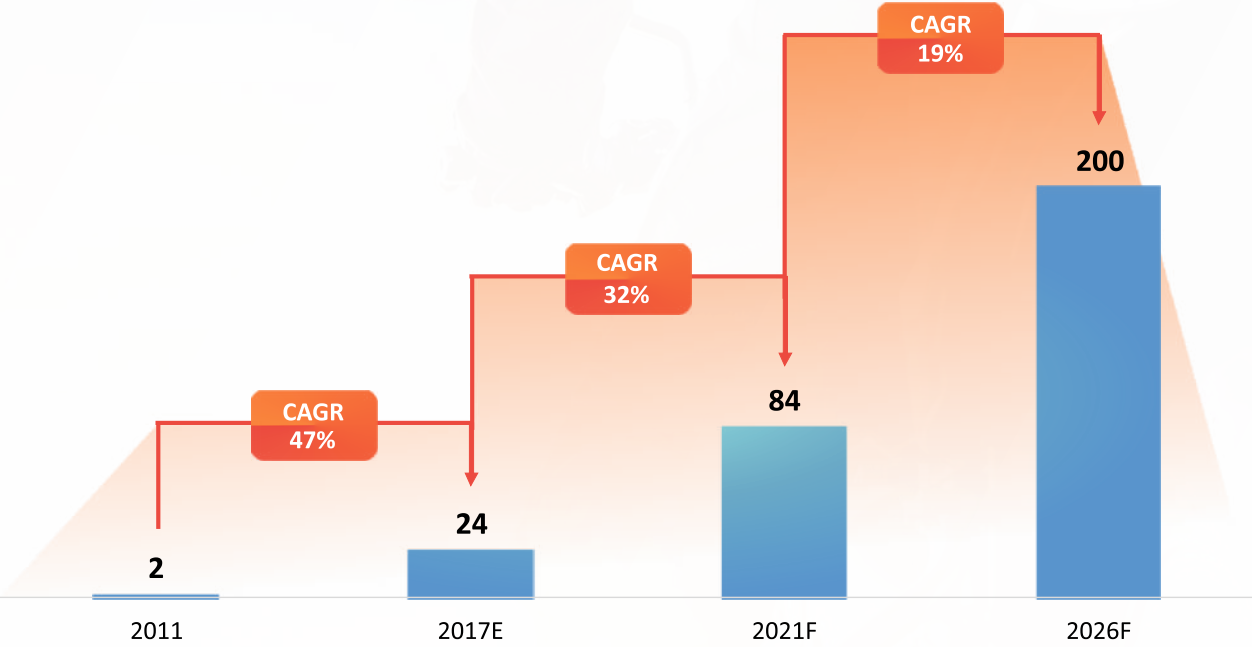
Internet usage evolution funnel, 2018 (Mn)

XX% % of Online Population X # of Users (Mn)



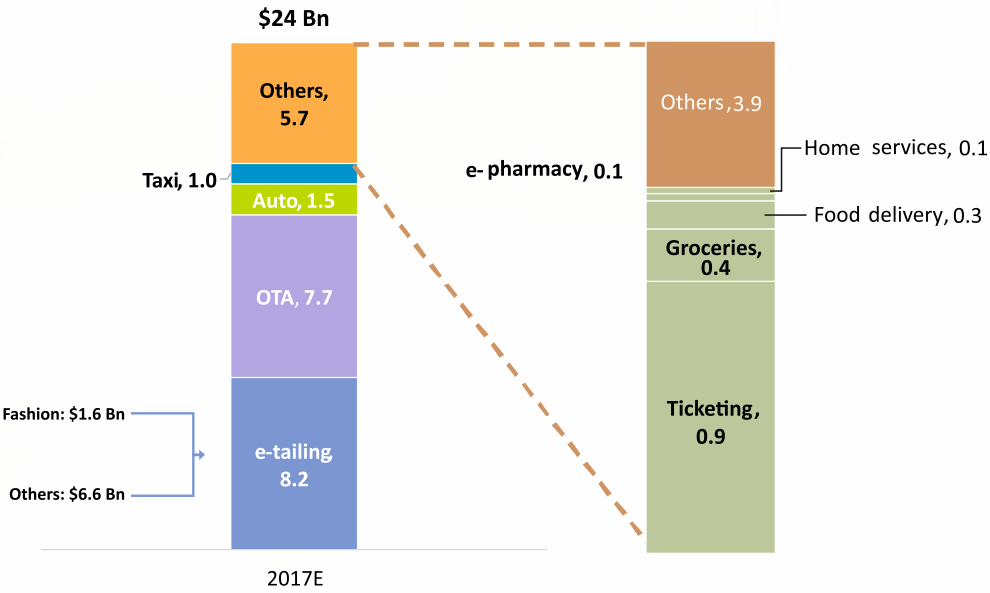
Source: Droom Yellow Book, Redseer Consulting

Indian e-commerce market (\$ Bn)



Source: Droom Yellow Book, Deloitte

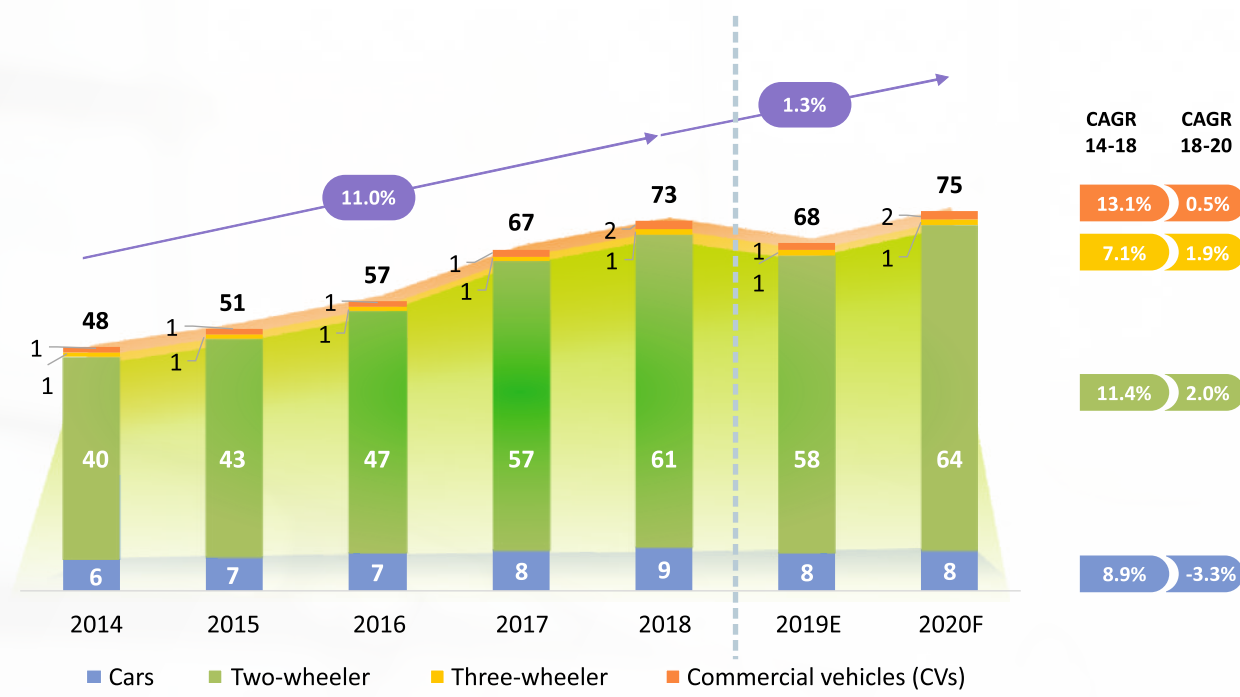
Indian e-commerce market split (\$ Bn)



Source: Droom Yellow Book, Deloitte, Redseer Consulting

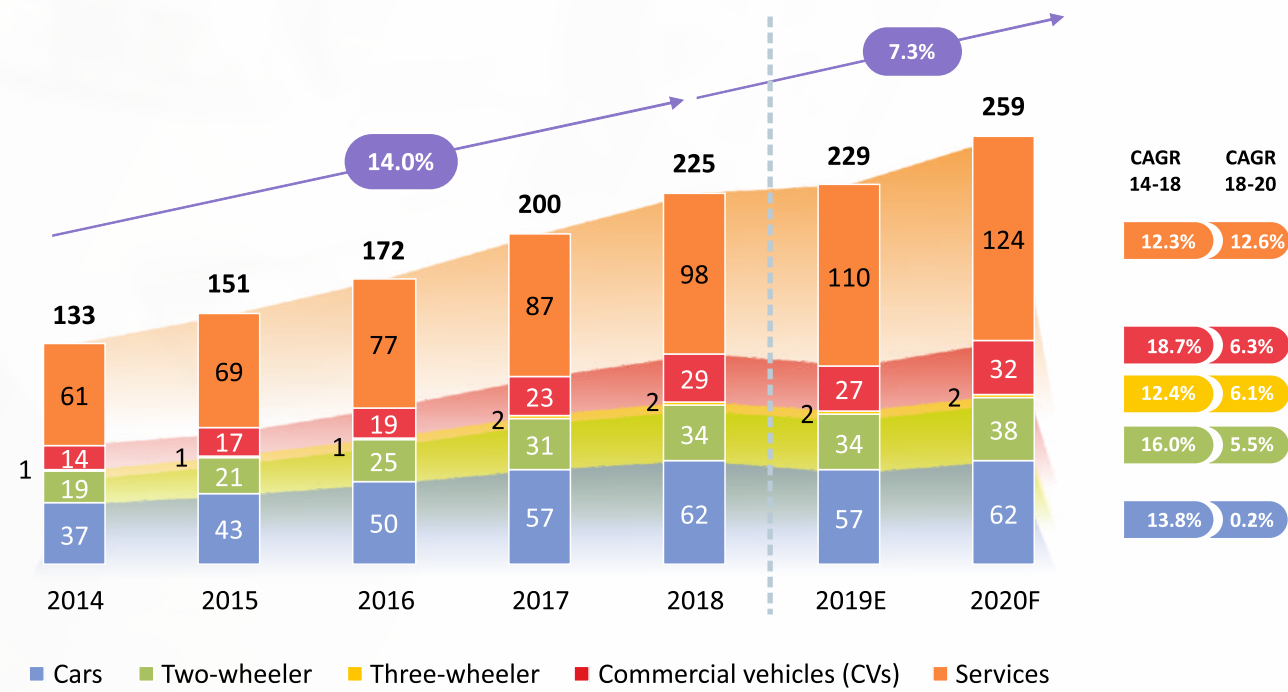
AUTO MARKET IN INDIA

Auto market in India (Sales, Mn units)



Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Press search

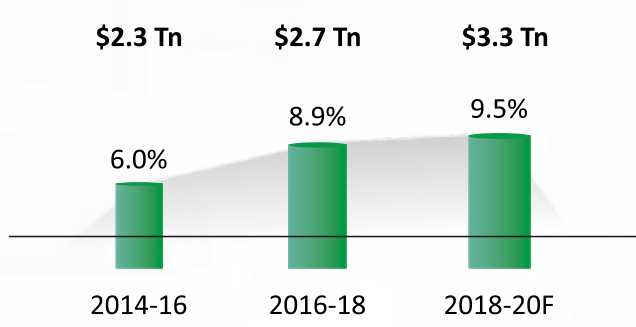
Auto market in India (\$ Bn)



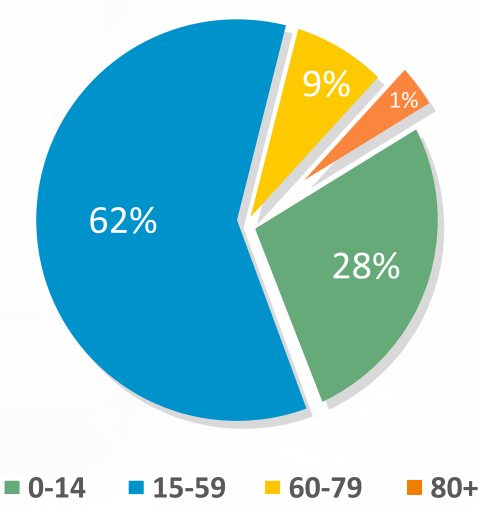
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Press search

Drivers for automobile growth in India

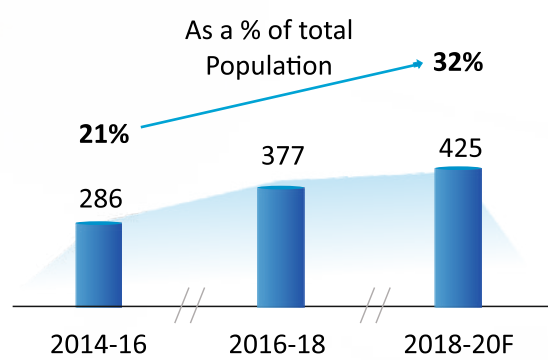
India to become a **\$3.3 Tn economy** by 2020...



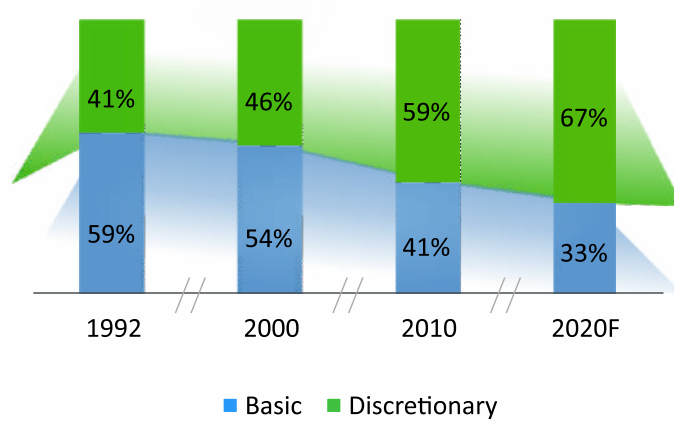
...with **working age population accounting for 62%** of population



Urban population to account for **~32%** by 2020

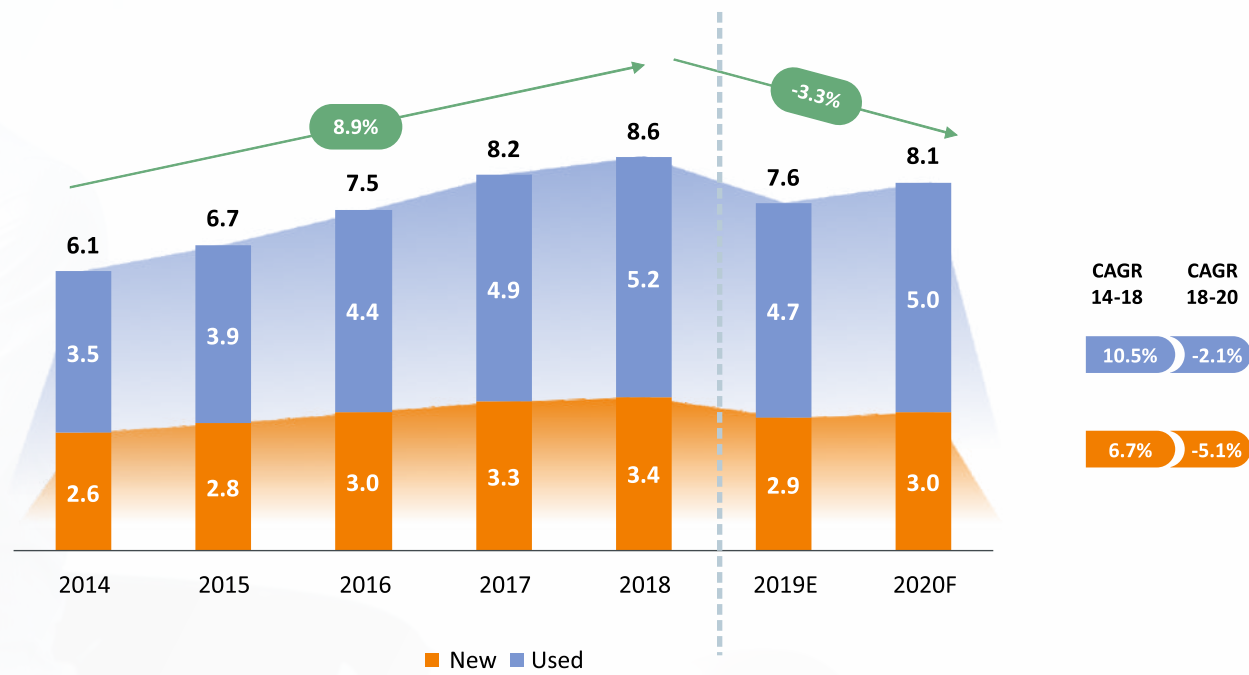


Share of **discretionary spending is increasing** in India¹



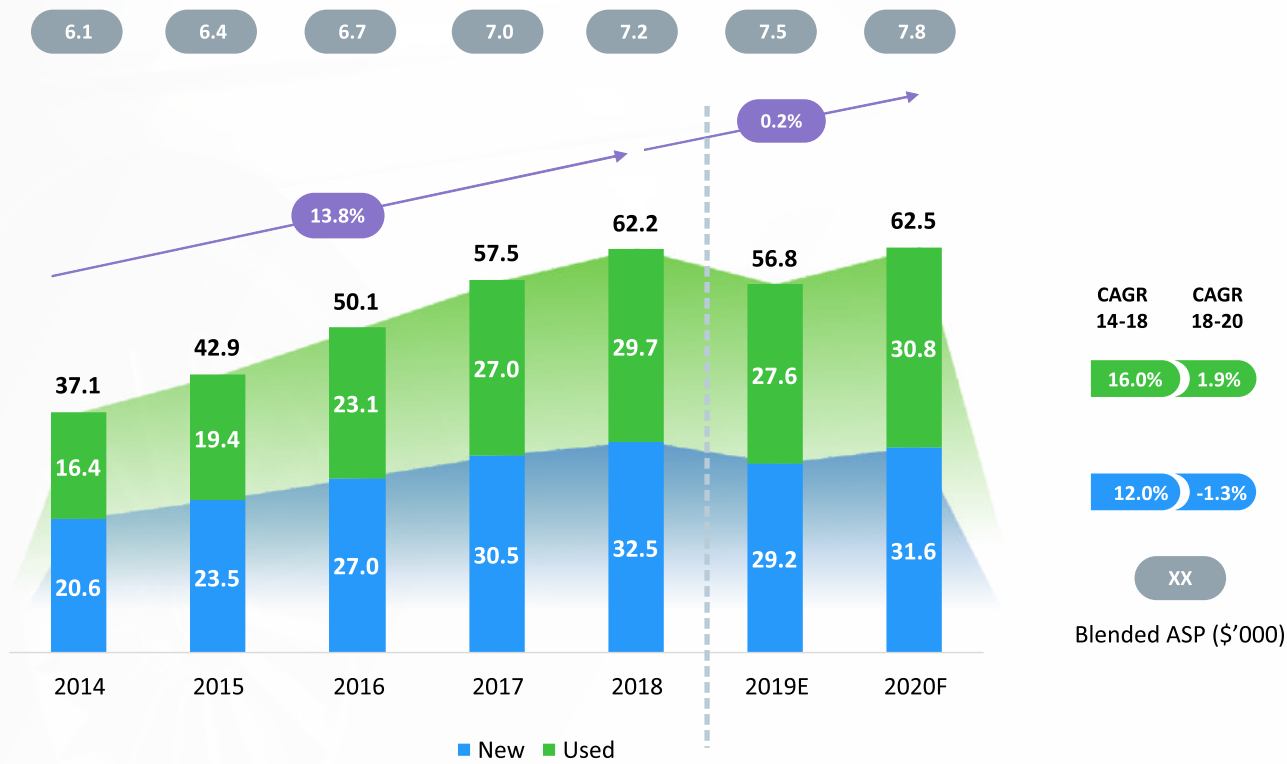
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, IMF, MOSPI, UN, D&B

Cars in India (Mn units)



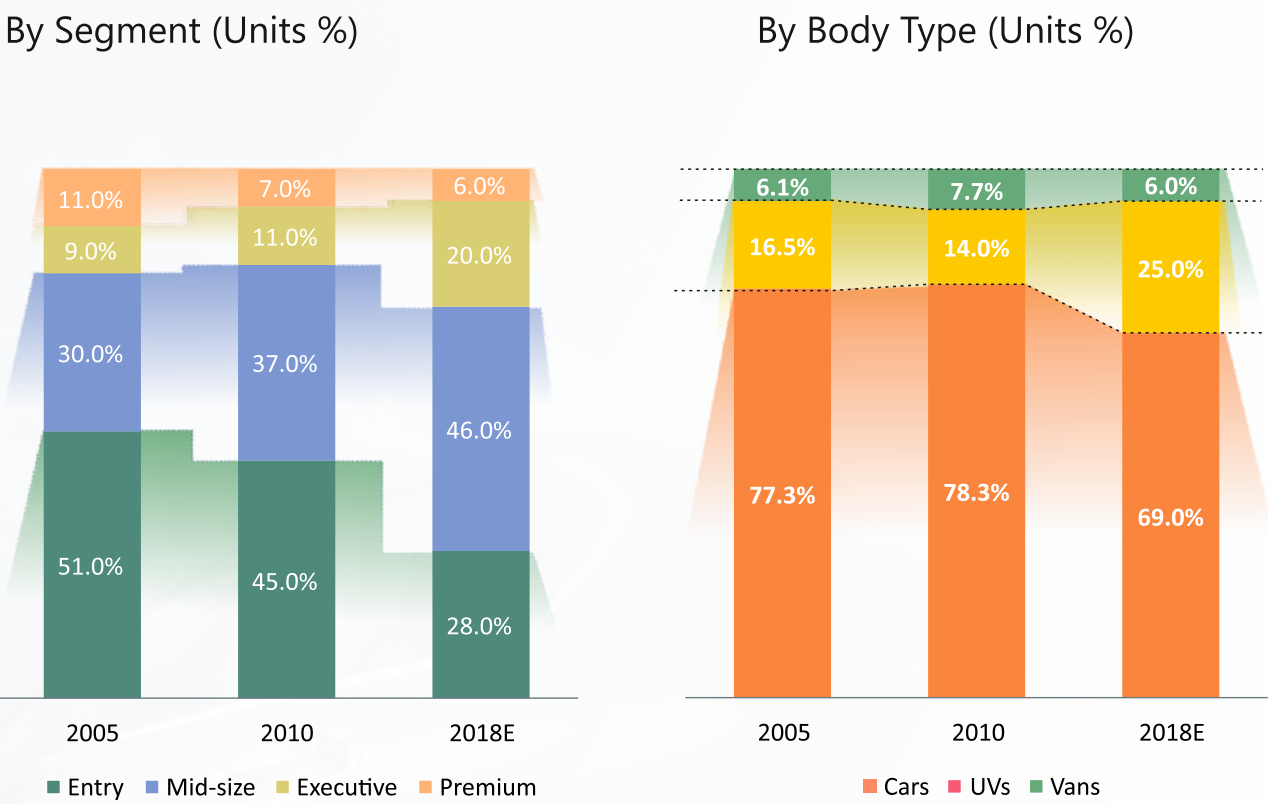
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM

Cars in India (\$ Bn)



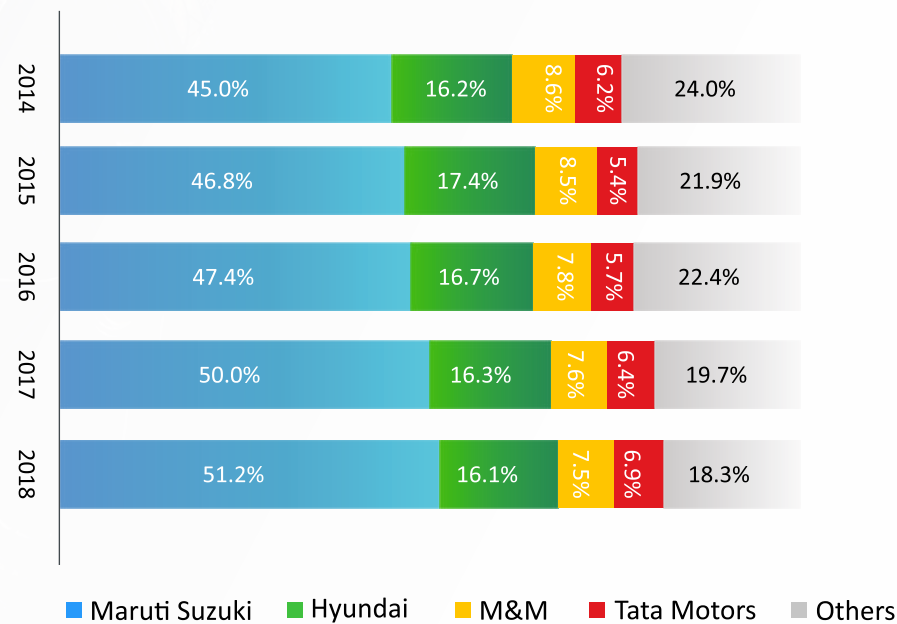
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Press search

New cars sales mix (Units %)



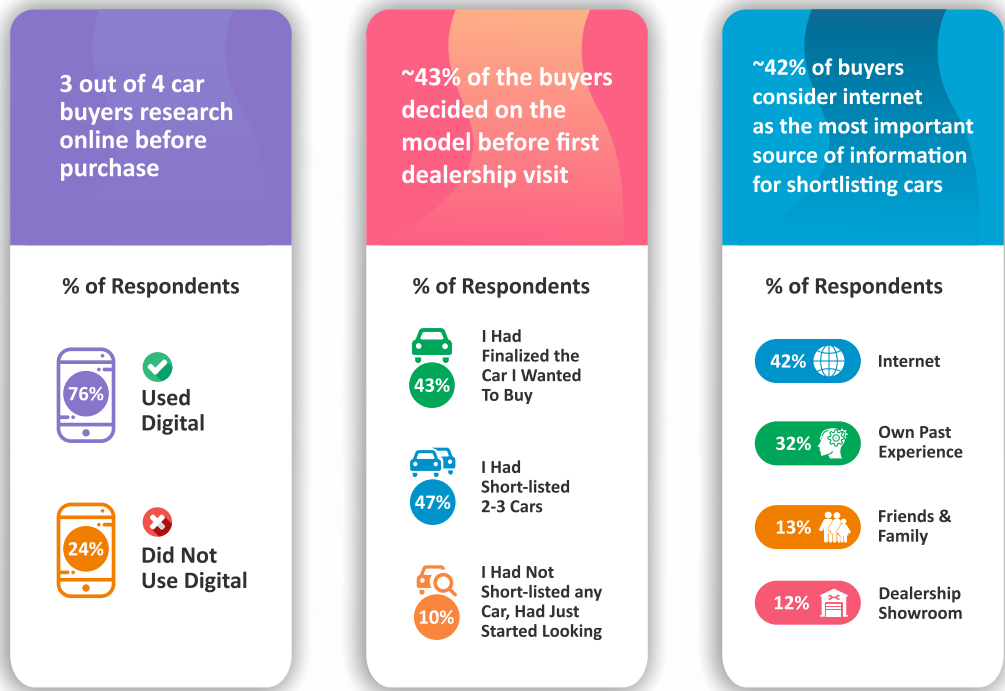
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, Edelweiss research, SIAM

Cars – market share (new units)



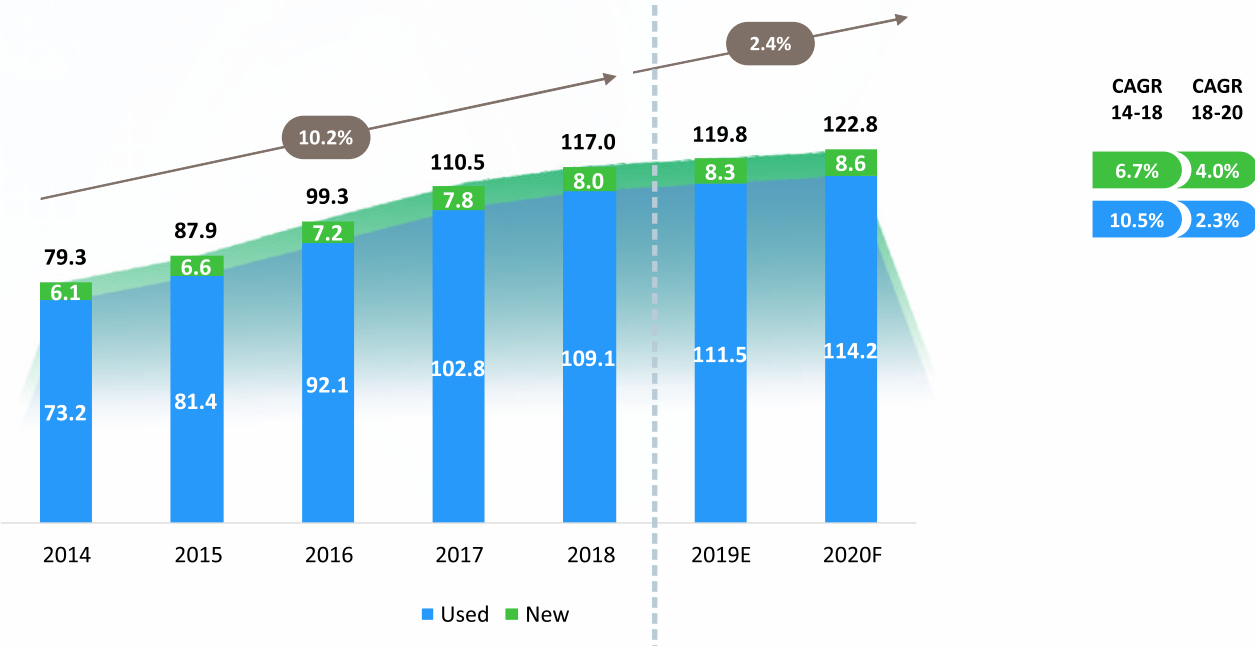
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Press search

Digital platforms becoming central to car purchasing process



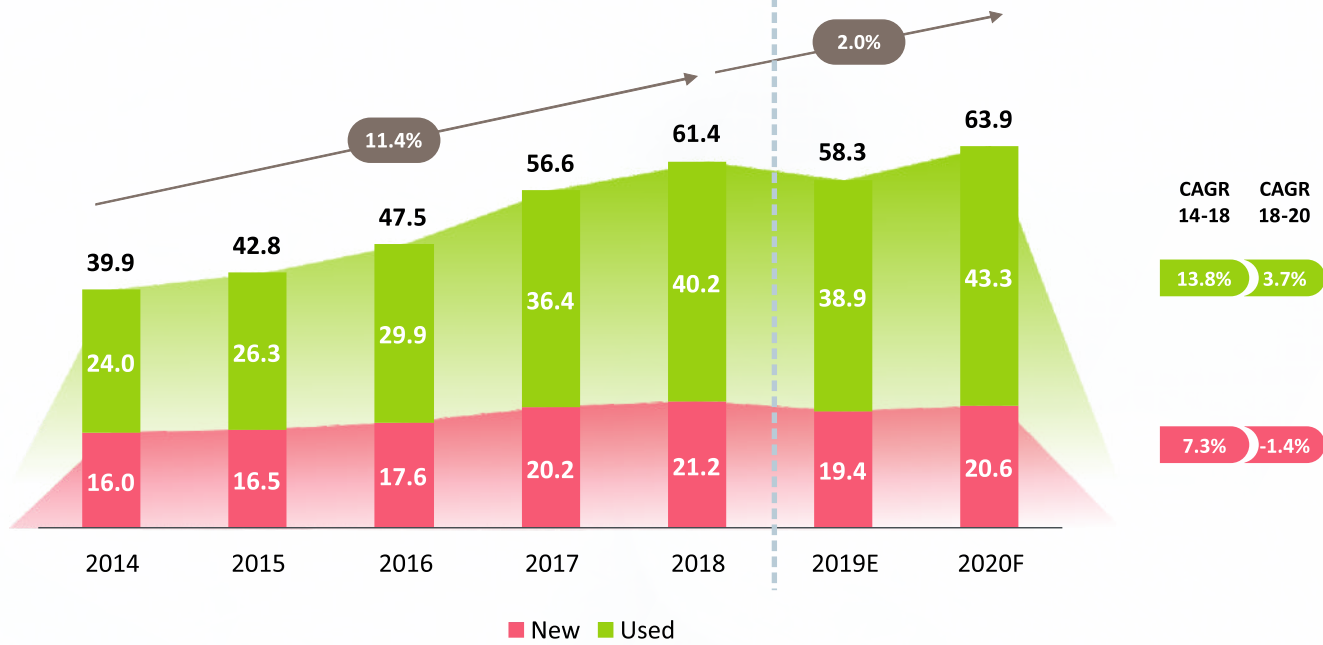
Source: Droom Yellow Book, BCG

Car dealers in India ('000)



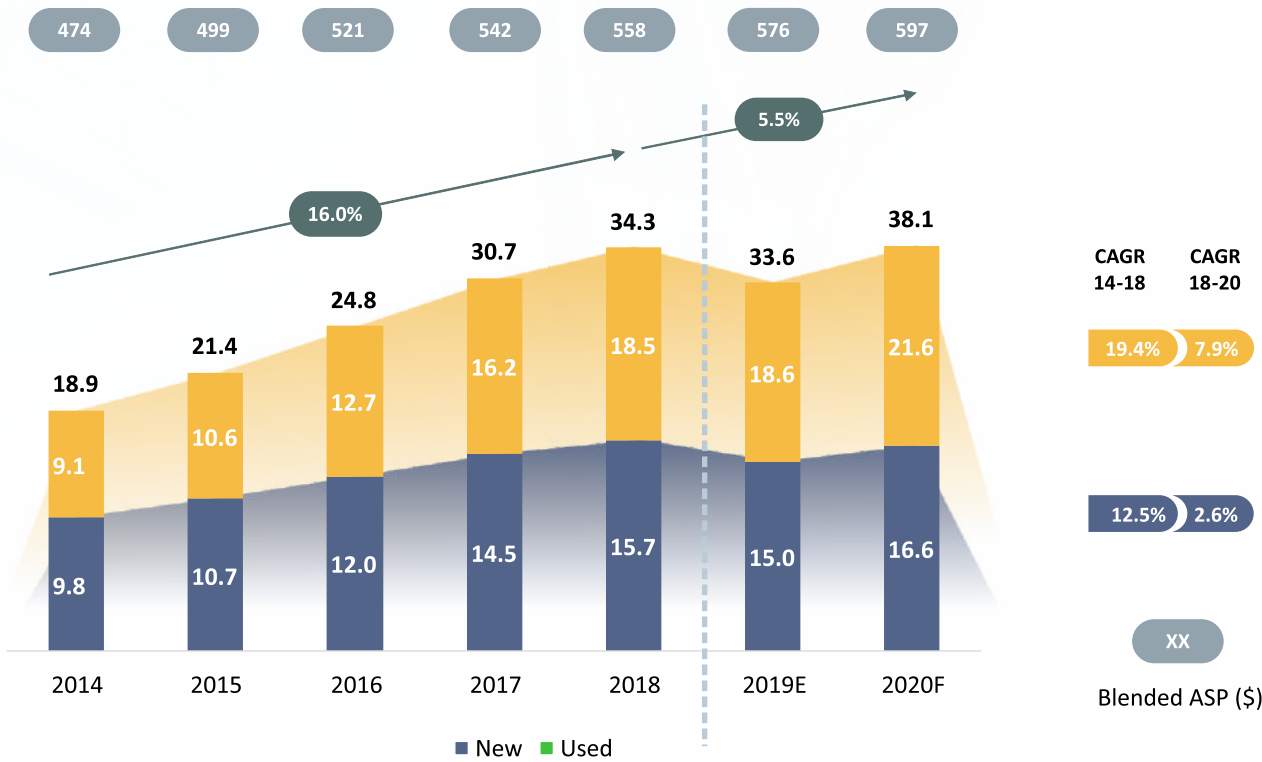
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, Press search

Two-wheeler market in India (Mn units)



Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM

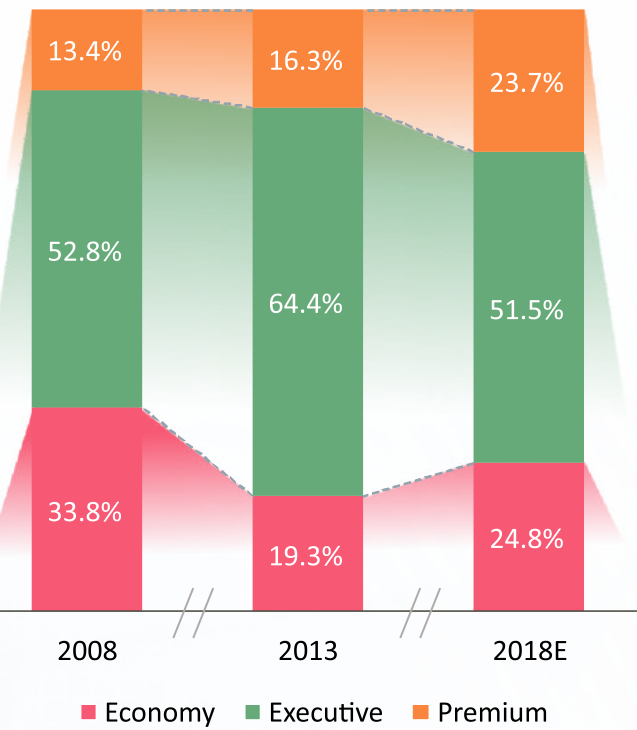
Two-wheeler market in India (\$ Bn)



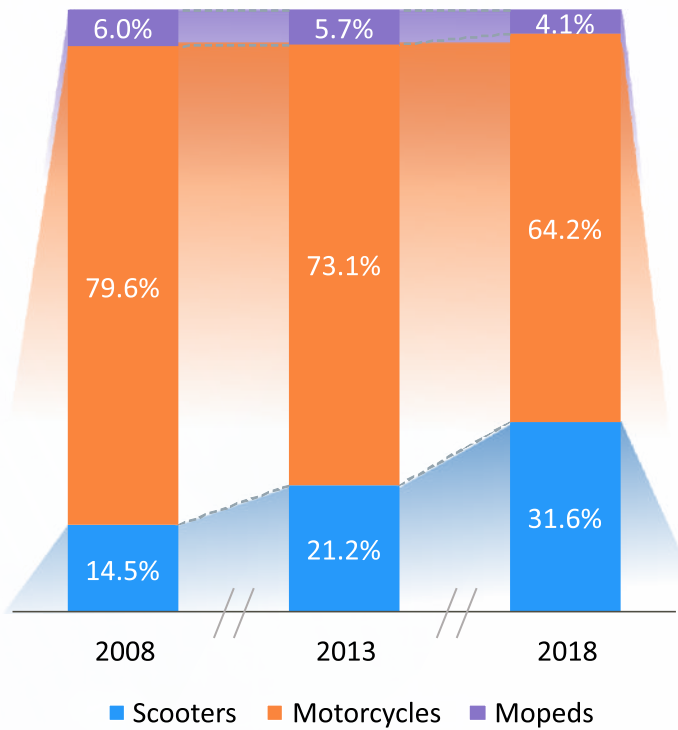
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Press search

New two-wheeler sales mix (%)

By Segment (Units %)

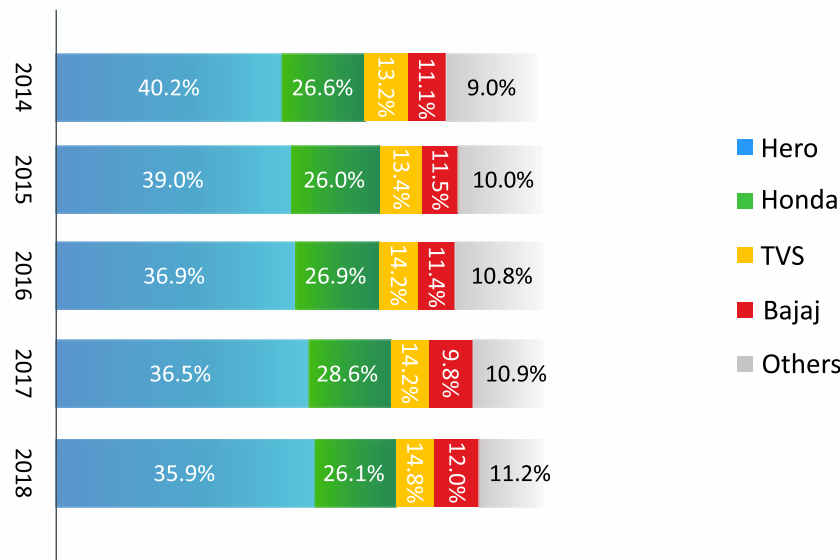


By Body Type (Units %)



Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, Citi Bank research

Two-wheeler – market share (new units)



Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM

Drivers for increasing 2w penetration

Two-wheeler penetration

- India has overtaken China to become world's largest two-wheeler market
- However, two-wheeler penetration remains very low in India

Two wheeler penetration (per '000 people)

Financing penetration

- In India, penetration of household credit¹ is 11% vs. 35% avg. for emerging markets
- Also, financing penetration for two-wheelers remains very low
- Demand for two-wheelers expected to grow with increased financing penetration

Finance penetration by vehicle type (2018)

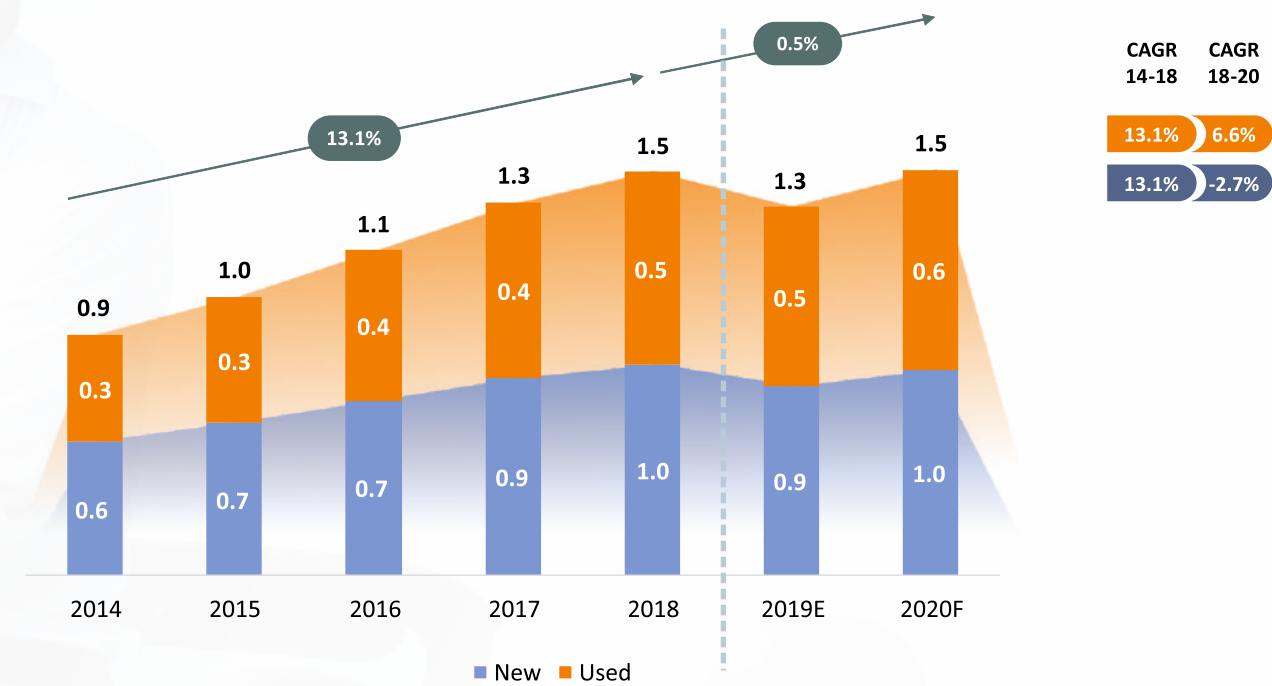
Women participation in workforce

- In India, women participation in workforce remains very low vs. Asian peers
- Increasing women participation in the workforce presents significant demographic benefit

Women as a % of total workforce (2018)

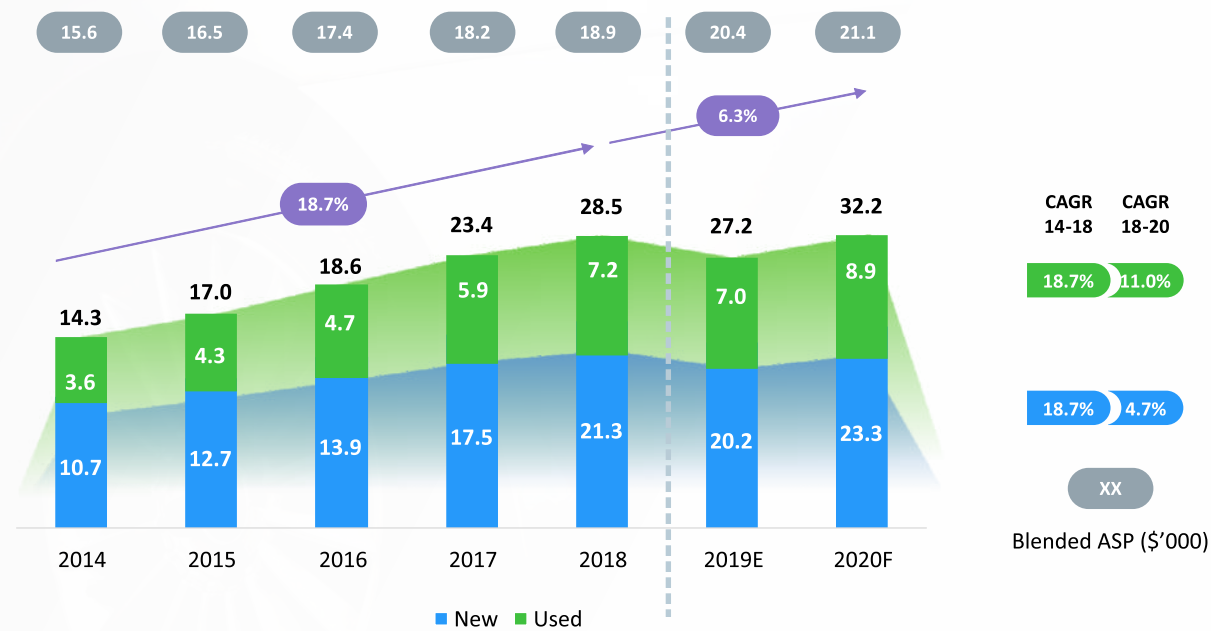
Note: 1) As % of GDP
Source: Droom Yellow Book, Hero MotoCorp investor presentation

Commercial vehicles (CV) market in India (Mn units)



Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM

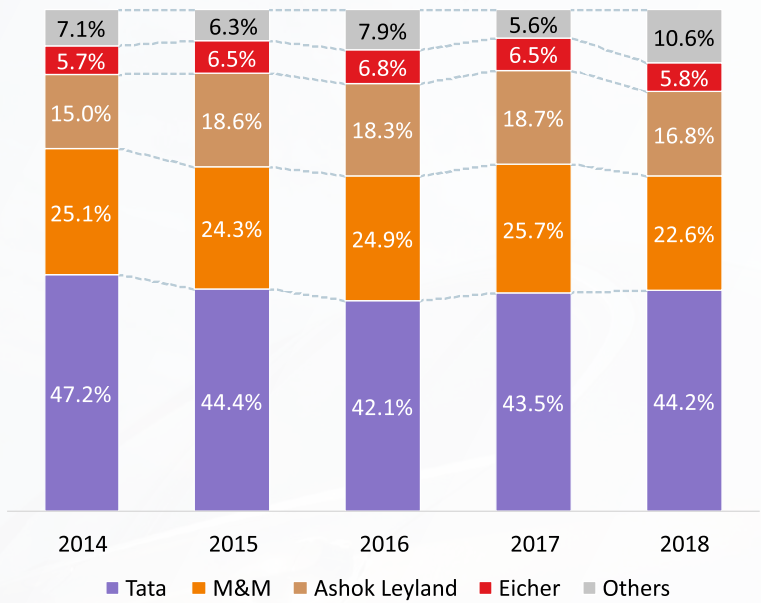
Commercial vehicles (CV) market in India (\$ Bn)



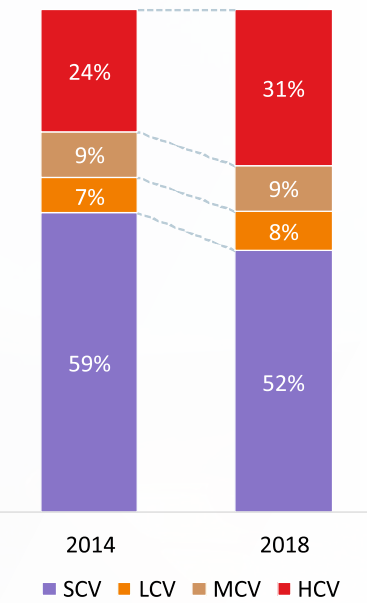
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Press search

Commercial vehicles (CV) – Market Share and Sales mix

Commercial vehicles (CV) – market share (new units)

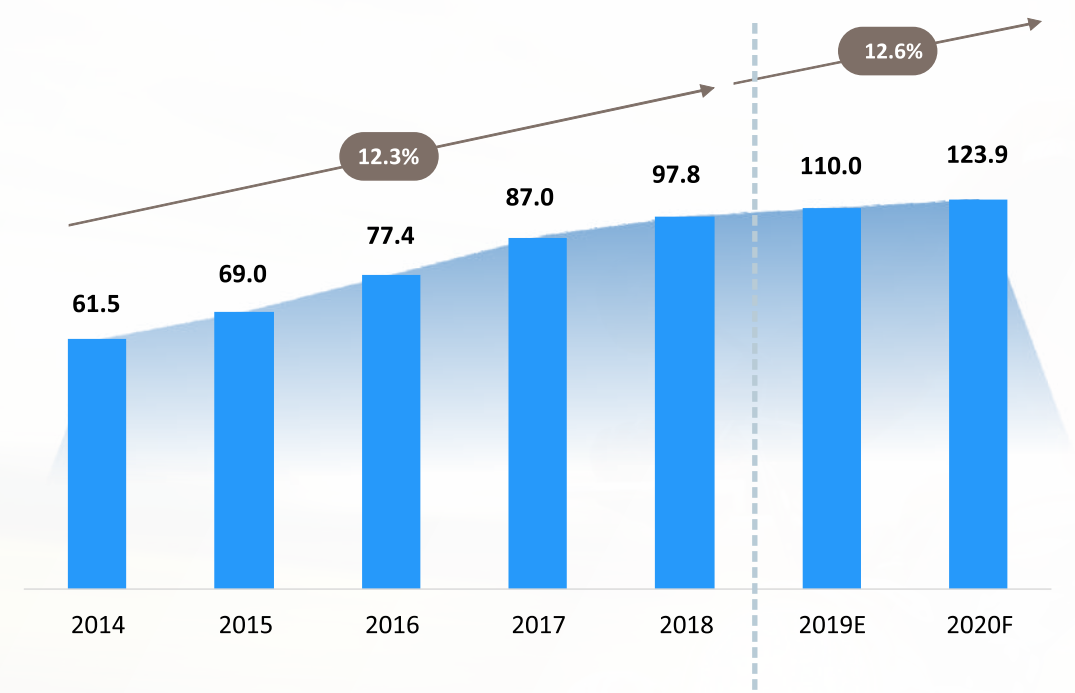


New CVs sales mix (%)



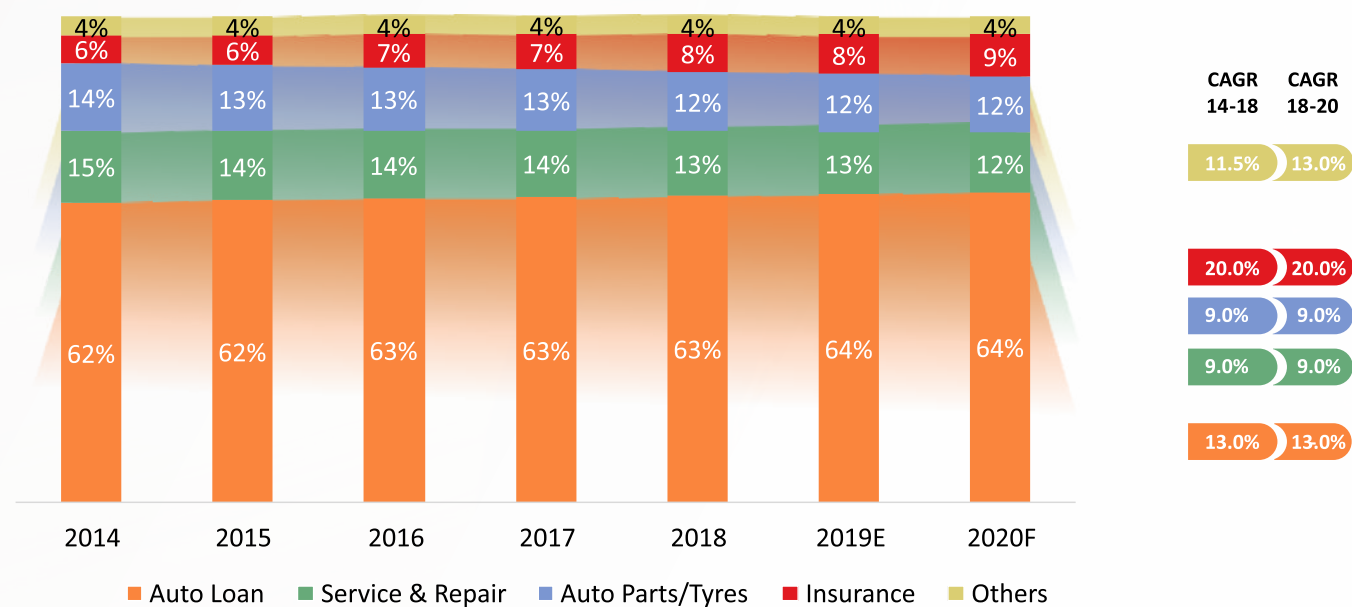
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Autobei Consulting

Auto services market in India (\$ Bn)



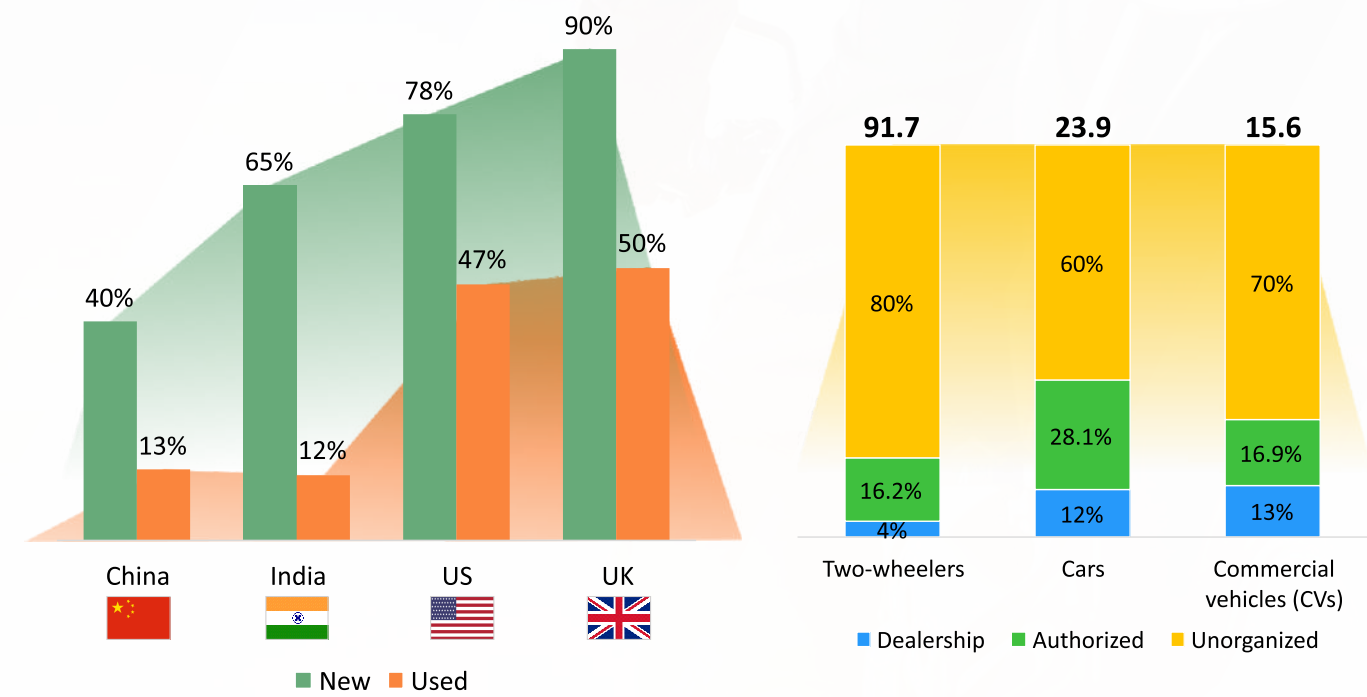
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, SIAM, Autobei Consulting

Auto services market split (%)



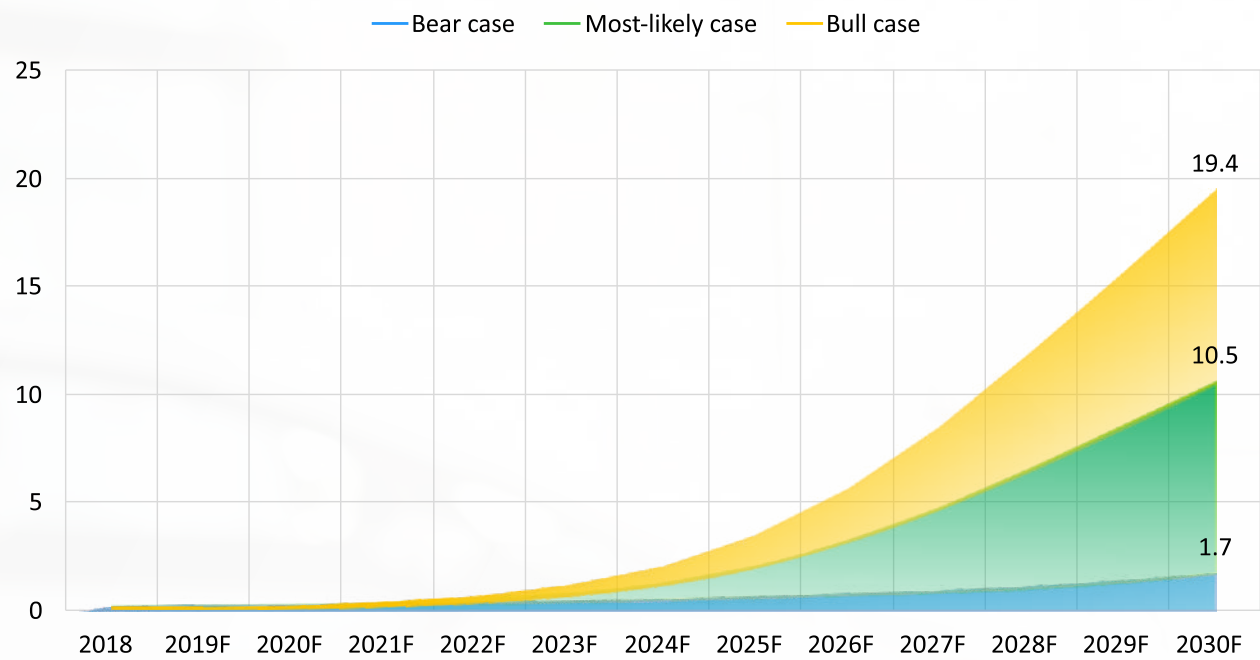
Note: 1) Data refers to fiscal year starting in April, 2) Includes Inspection, Warranty, Road side assistance, Car care, RTO assistance, Certification, Auto accessories and Discovery
Source: Droom Yellow Book

Low loan penetration and unorganized vehicle servicing landscape



Source: Droom Yellow Book, KPMG, Press search

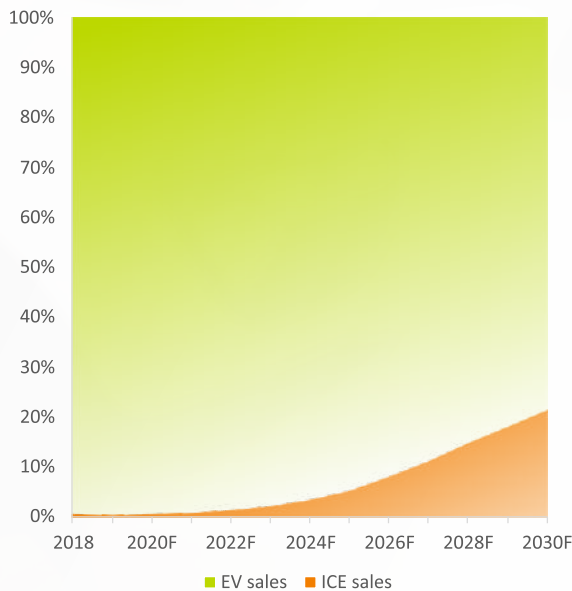
Various scenarios for EVs sale (excl. CVs) in India (Mn Units)



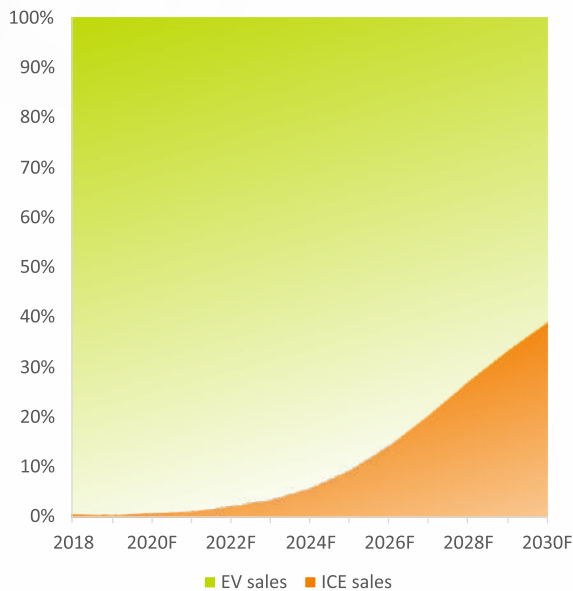
Note: 1) Data refers to fiscal year starting in April
Source: Droom Yellow Book, Niti Aayog, Innovation Norway

By 2030, as many as ~39% of new vehicles sold in India could be battery powered

EVs sale¹(excl. CVs), Most-likely case



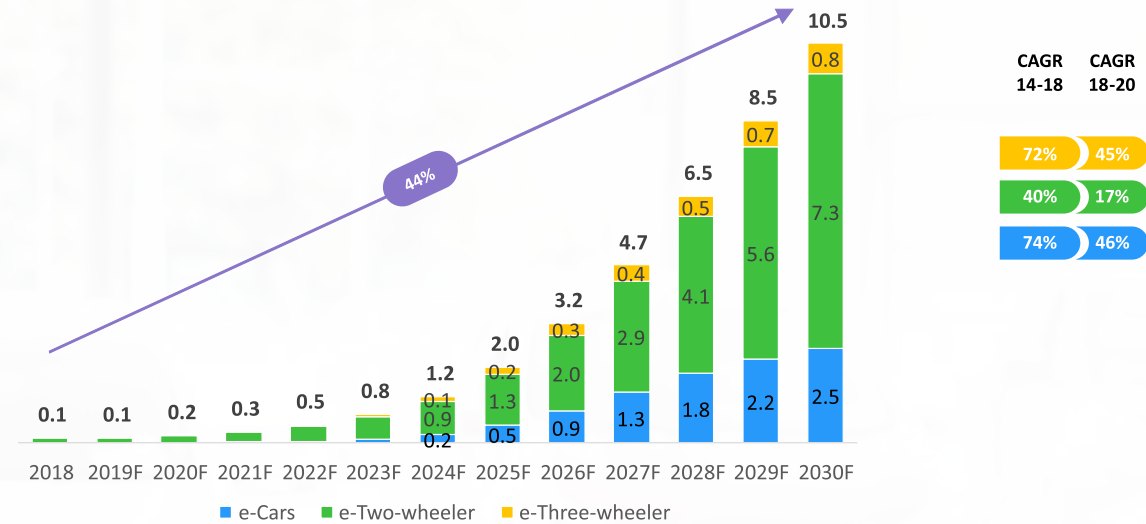
EVs sale¹ (excl. CVs), Bull case²



Note: 1) Data refers to fiscal year starting in April, 2) Assuming no significant regulatory change, such as govt. banning sales of ICE vehicles, 3) Internal Combustion Engine
Source: Droom Yellow Book, Niti Aayog, Innovation Norway

EV sales in India (excl. CVs), by type (Most-likely case, Mn Units)

EVs sale in India (excl. CVs), by type1 (Most-likely case, Mn Units)



Note: 1) Data refers to fiscal year starting in April, 2) Penetration of volumes
Source: Droom Yellow Book, Niti Aayog, Innovation Norway

Drivers for demand for EVs in India

Government support & subsidies

- Favourable policy interface such as FAME I and FAME II and pushing the adaptation of EVs through embellished incentives
- In the budget for FY20, govt. increased income tax deduction on the interest paid to buy an e-vehicle to Rs 2.5 lakh
- Govt. has also proposed GST rate reduction from 12% to 5%

Reduction in carbon footprint

- By 2020, govt. has put a regulatory CO2 emissions limit at 95 g/km as an average value throughout the vehicle fleet
- Hence, Bharat VI norm has been placed for ICE drive trains
- Govt.'s commitment to significantly reduce carbon footprint to act as a catalyst for growth of EV market in India

Manufacturing of battery packs

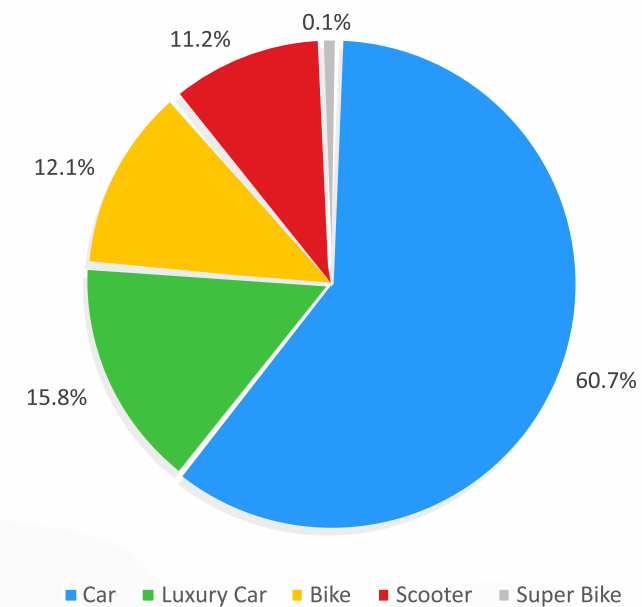
- Battery pack and its management accounts for >50% of the cost of an EV, and currently, these are manufactured in China and Japan and imported to India
- India plans to capture ~80% of economic opportunity, by only importing raw metals and developing the entire battery pack which is expected to reduce the cost for EVs significantly

Note: 1) Data refers to fiscal year starting in April, 2) Penetration of volumes
Source: Droom Yellow Book, Enincon consulting, Press search

WHAT INDIA IS BUYING IN 2019

Category Mix

% breakdown based on online sales



Source: Droom Yellow Book

Top 10 Best Selling by Category



Car

Toyota Fortuner

Maruti Suzuki Swift Dzire

Toyota Innova Crysta

Maruti Suzuki Wagon R

Toyota Innova

Maruti Suzuki Swift

Hyundai i10

Maruti Suzuki Alto

Honda City

Hyundai Santro



Bike

Bajaj Pulsar

Hero Splendor Plus

Hero Passion Pro

TVS Apache RTR

Royal Enfield Classic

Bajaj Avenger

Honda CB Shine

Yamaha FZS

Hero Splendor Pro

Bajaj Platina



Scooter

Honda Activa

Tvs Jupiter

Honda Activa 3g

Suzuki Access

Honda Activa 4G

Honda Aviator

Honda Activa 125

Hero Maestro

Honda Activa 5G

Honda Dio



Super Bike

Harley Davidson Street 750

Harley Davidson Iron 883

Harley Davidson Sportster 883

Benelli TNT 600i

Harley Davidson Forty Eight

Kawasaki Ninja

Benelli TNT 300

Ducati Monster

Honda Activa 5G

Honda Dio



Luxury Car

BMW 5 Series

Mercedes-Benz E-Class

Mercedes-Benz C-Class

Audi A4

BMW 3 Series

Audi Q3

Audi A6

Audi Q7

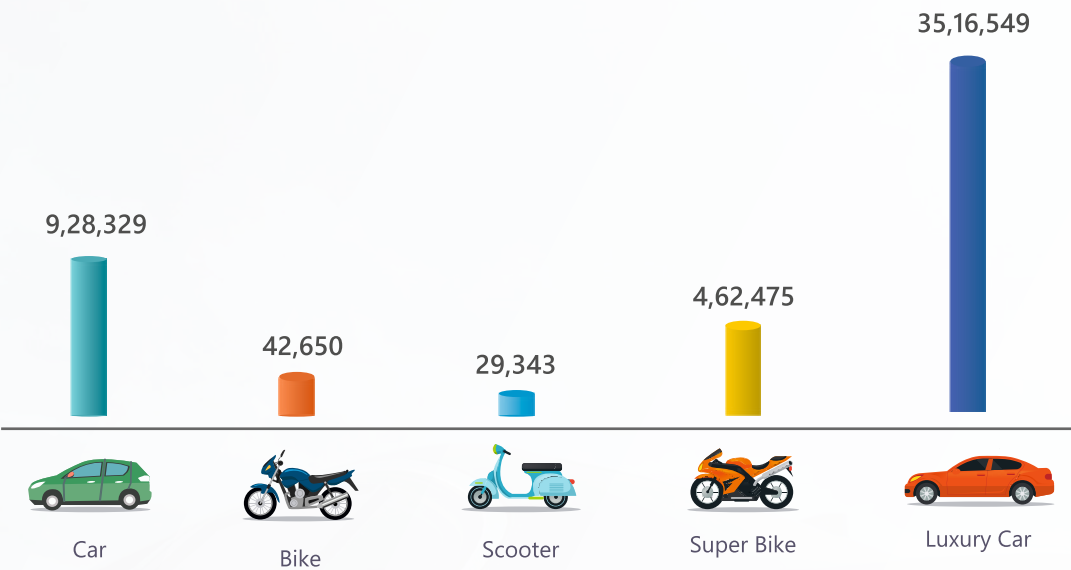
BMW X1

Audi Q5

Source: Droom Yellow Book

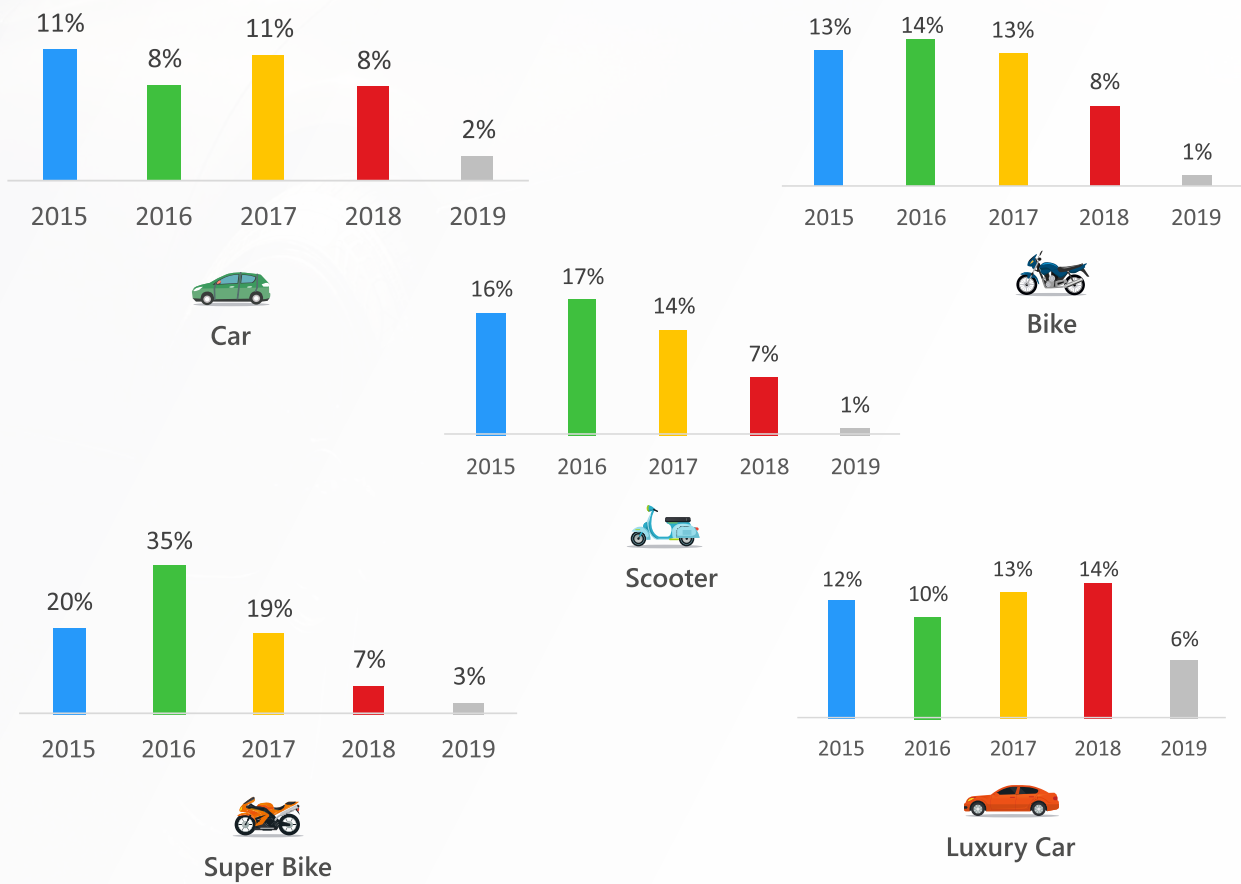
Average Selling Price of Used Automobiles

(In Rs.)



Source: Droom Yellow Book

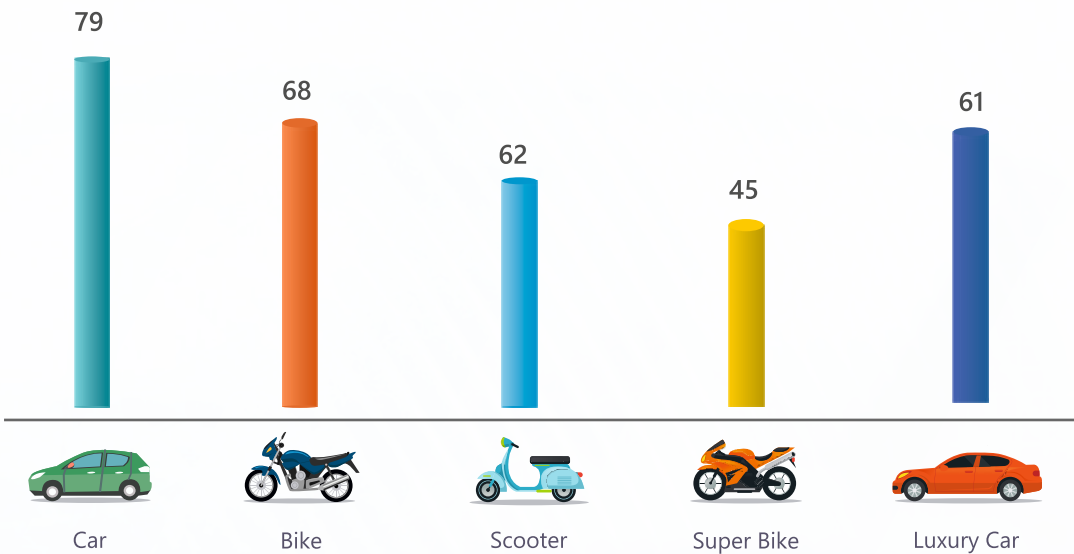
Most Popular Years by Category



Note: 1) Numbers do not add up to 100% as balance sales are for models prior to 2015
Source: Droom Yellow Book

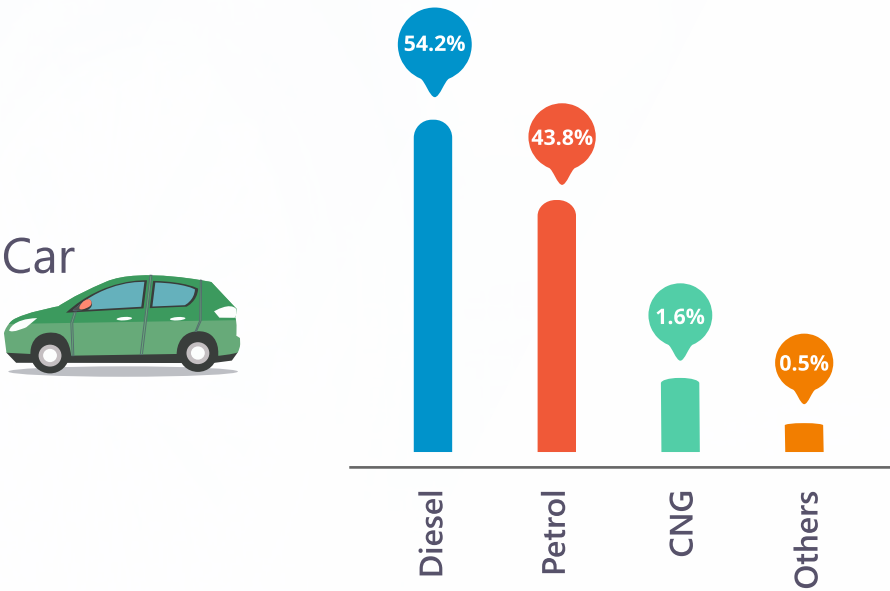
Average Duration of Ownership by Category

In Months



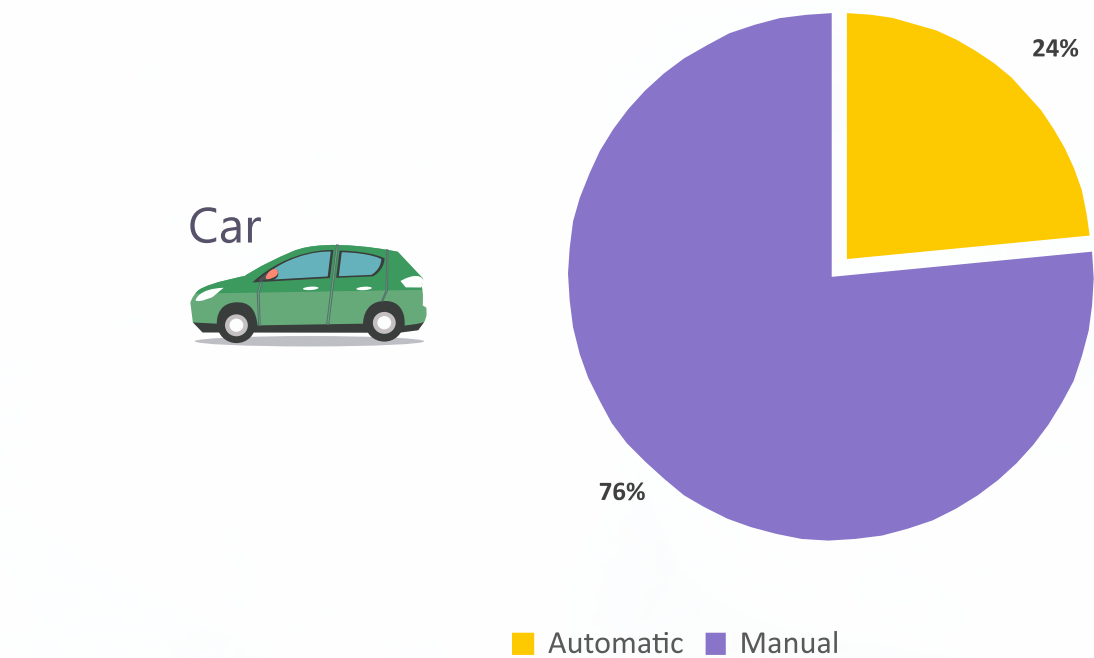
Source: Droom Yellow Book

Cars by Fuel Type



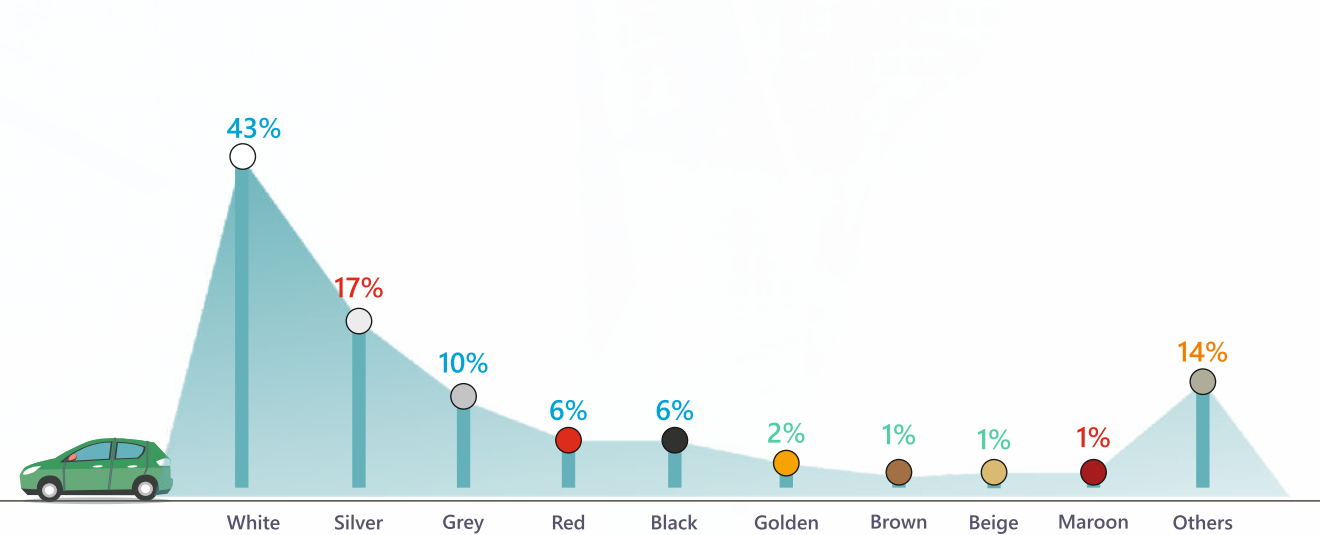
Note: 1) Others include LPG and Hybrid cars
Source: Droom Yellow Book

Cars by Transmission Type



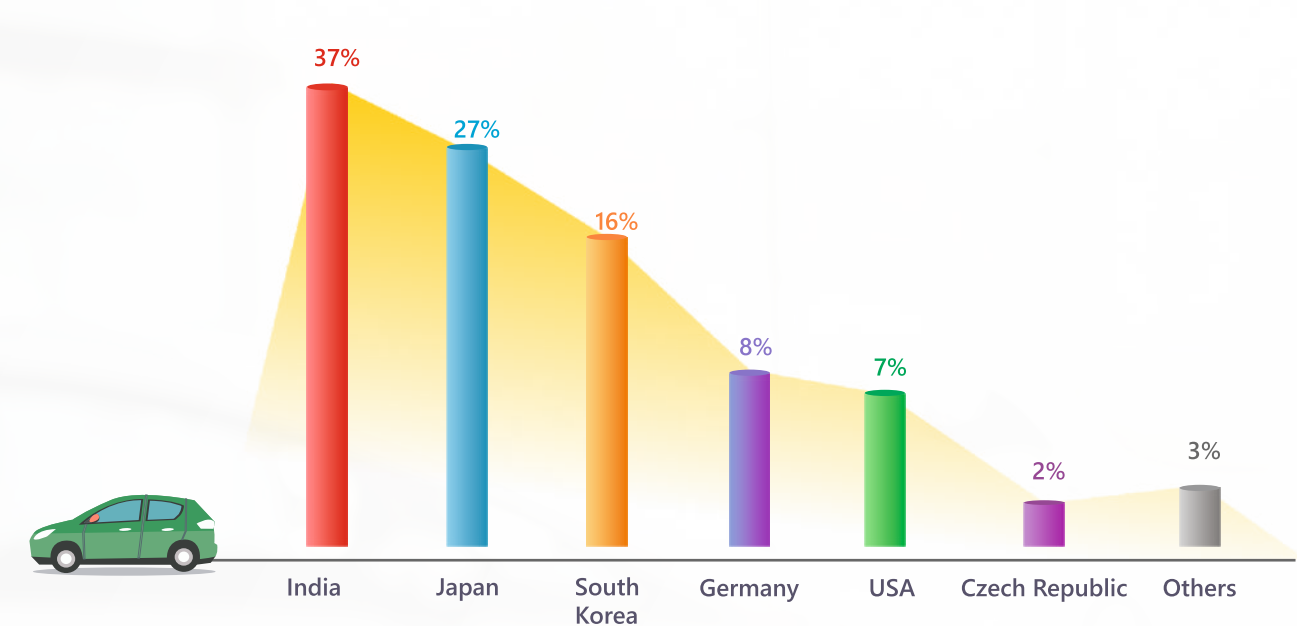
Source: Droom Yellow Book

Cars by Colours



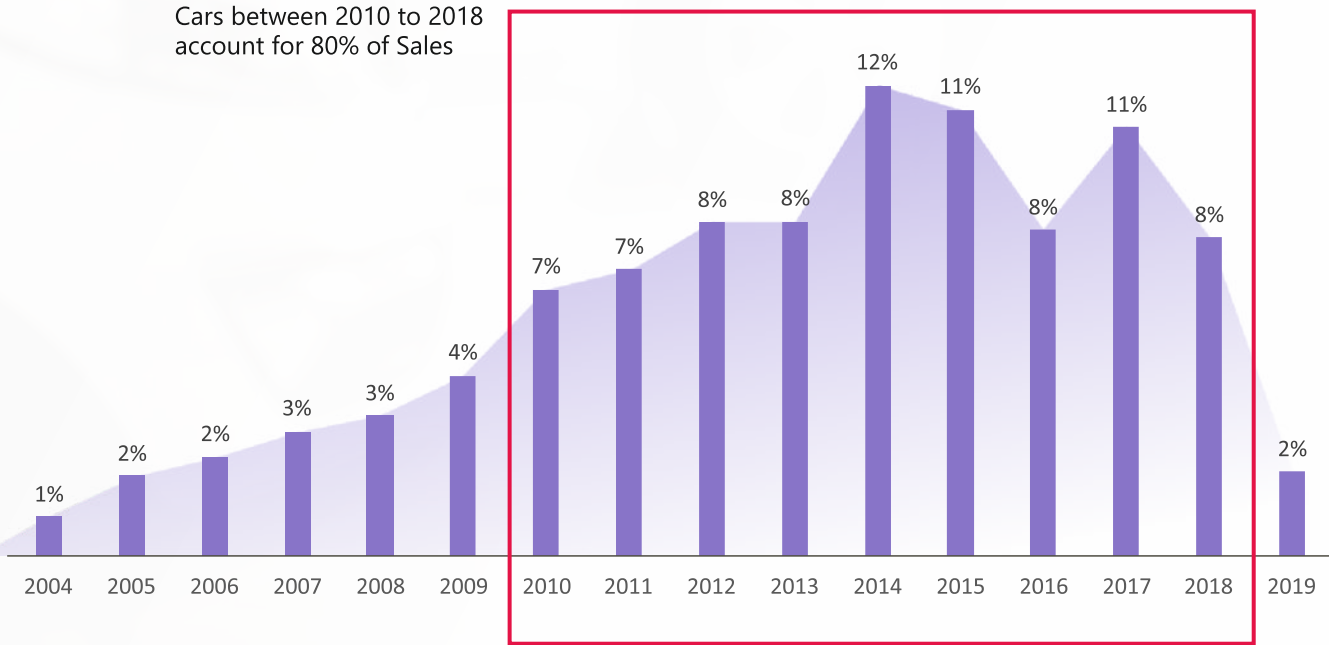
Source: Droom Yellow Book

Cars by OEM's Country of Origin



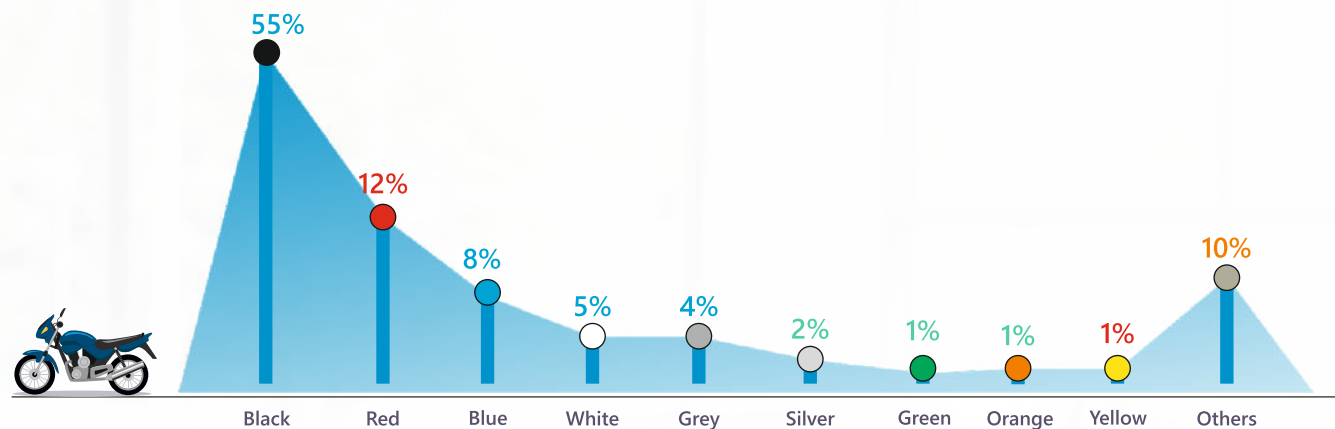
Source: Droom Yellow Book

Cars by Year of Manufacture



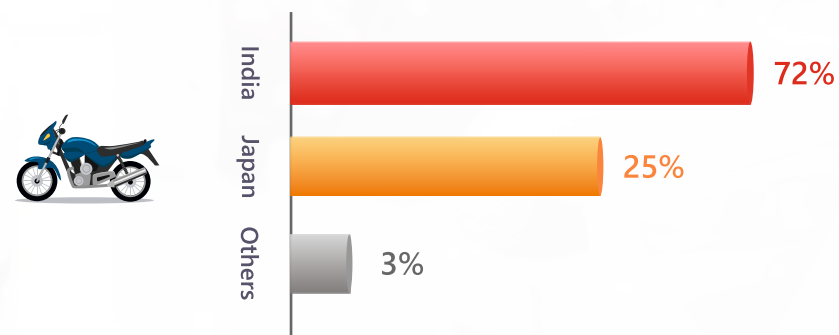
Source: Droom Yellow Book

Bikes by Colour



Source: Droom Yellow Book

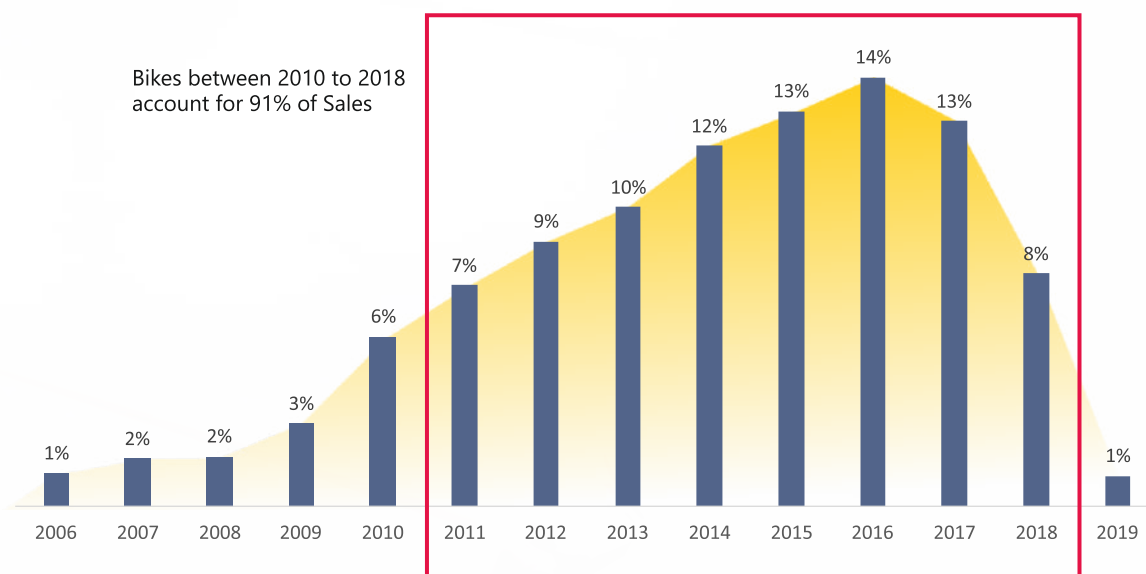
Bikes by OEM's Country of Origin



Source: Droom Yellow Book

Bikes by Year of Manufacture

Bikes between 2010 to 2018 account for 91% of Sales



Source: Droom Yellow Book



DROOM YELLOW BOOK

ABOUT YELLOW BOOK

Droom's Yellow Book is the most comprehensive and authentic data book on India's automobile market.

Unparalleled access to used vehicle transactions data coupled with new sales data, puts Droom in an enviable position to harness it for market sizing and forecasting.

Droom's 12 member team, comprising of Strategy and Analytics professionals use AI to draw insights and regularly update the Yellow Book.

AUTOMOBILE

EFFECTIVE BUSINESS STRATEGIES

Sandeep Aggarwal
Founder & CEO, Droom

Sandeep Aggarwal is the founder of two marketplaces in India - Droom and ShopClues.com. He has been an angel investor, serial entrepreneur, philanthropist and Internet visionary for a decade. Sandeep has got an MBA from Washington University in St. Louis and holds a US patent. Having worked in Silicon Valley and Seattle for about 12 years, Sandeep has rich experience in the global Internet and e-commerce industry.

350K+
B2C SELLERS

122K+
PRODUCTS

1.8Mn+
LISTINGS

\$16Bn+
LISTED GMV

6.4Mn+
FB COMMUNITY

13Mn+
APP DOWNLOADS



www.droom.in
www.droom.in/app

info@droom.in
www.facebook.com/droom.in

