

The background of the cover is a dark, textured composition. It features a faint world map with a dotted pattern, several upward-pointing arrows of varying sizes, and a bar chart at the bottom with yellow and grey bars. The overall color palette is dominated by dark brown, gold, and yellow.

droom

YELLOW

BOOK
2022

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

ABOUT DROOM

Droom is a technology and data science company that facilitates automobile buying and selling online through a combination of our asset-light automobile e-commerce platform along with a technology-driven vertically integrated proprietary ecosystem of products and services for the automobile industry. We offer a 21st-century e-commerce experience for automobiles and is one of the leading e-commerce platforms for used cars sales in India. We are the only major Indian player with a completely online transactional model and offer one of the largest selection of automobiles amongst the major online players in India with over 1.15 million vehicles listed that includes both used and new cars and two-wheelers, and other vehicles, as of September 30, 2021. We have expanded our platform to include over 11 vehicle categories, sold by auto dealers and individual sellers in 1,151 cities in India. Our automobile e-commerce platform, which includes our website and mobile apps, offers users convenience and a curated experience to buy and sell new and used vehicles and encompasses every element of automobile buying from searching for a vehicle, creating buying requirements, price discovery, booking, certification to purchase and financing and doorstep delivery.

As a pure-play automobile e-commerce company, we provide a platform for buyers and sellers to transact vehicles and related services. To address structural constraints of the automobile market and buyers' and sellers' pain points, we have built a platform that aims to deliver wide selection, low prices, inspected and verified vehicles, loan and insurance, and seamless delivery for buyers as one unified Droom experience. For used vehicle dealers and individual sellers, besides being able to reach out to a potential buyer online, we offer an end-to-end e-commerce solution including technology platform, digital catalogue, online payment, vehicle inspection and certification service, and vehicle delivery service.

We are led by our founder, Promoter, Chairman, Whole-time Director & Chief Executive Officer, Sandeep Aggarwal who has over 20 years of experience in the technology and e-commerce space. He is supported by our leadership team that has strong academic credentials and extensive experience across various industries ranging from global technology companies to consumer brands and professional services firms.

We are backed by several marquee institutional shareholders, such as Lightbox Ventures II, Lightbox Expansion Fund, Beenos, Beenext, Toyota Tsusho, DG Ventures and 57Stars among others.

1,151+
CITIES

278,807
USED VEHICLE LISTINGS

\$2.09Bn+
USED VEHICLE LISTED VALUE

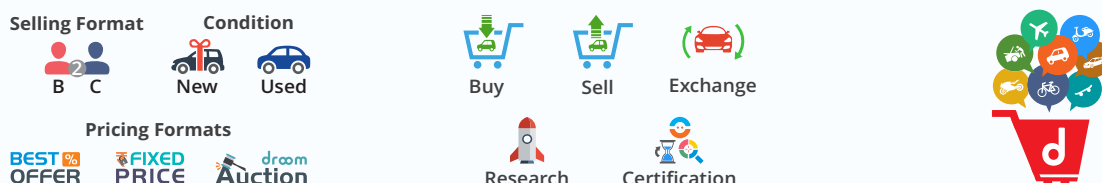
6.45Mn+
FB COMMUNITY

14.46Mn+
APP DOWNLOADS

Proprietary Ecosystem



Automobile E-commerce Platform



www.droom.in

info@droom.in

www.droom.in/app

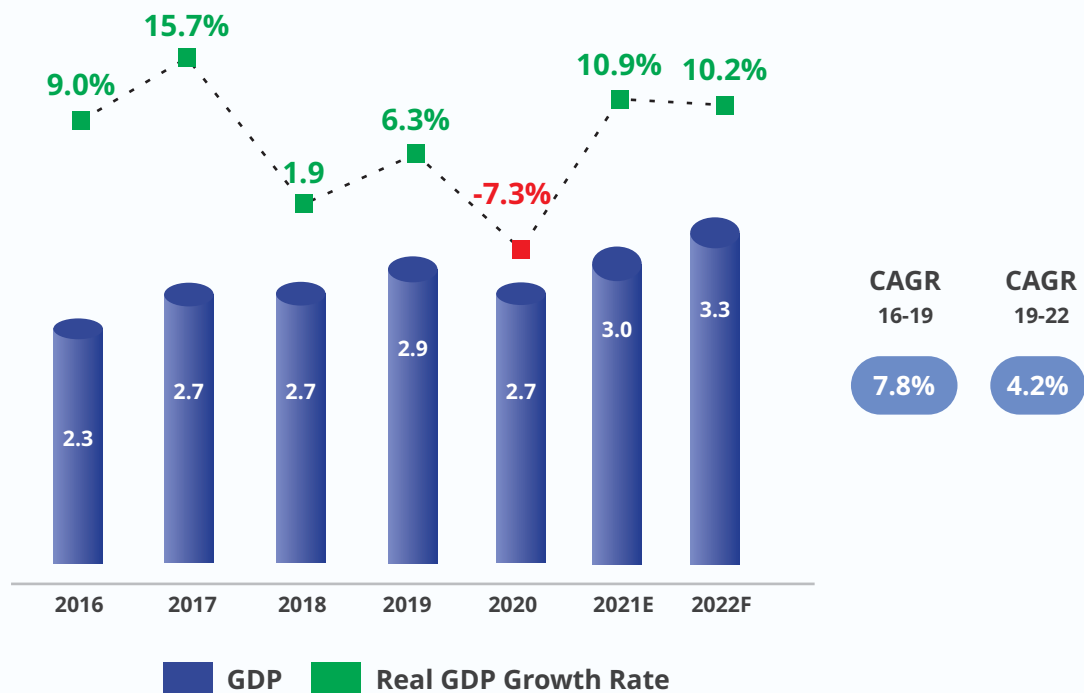
www.facebook.com/droom.in





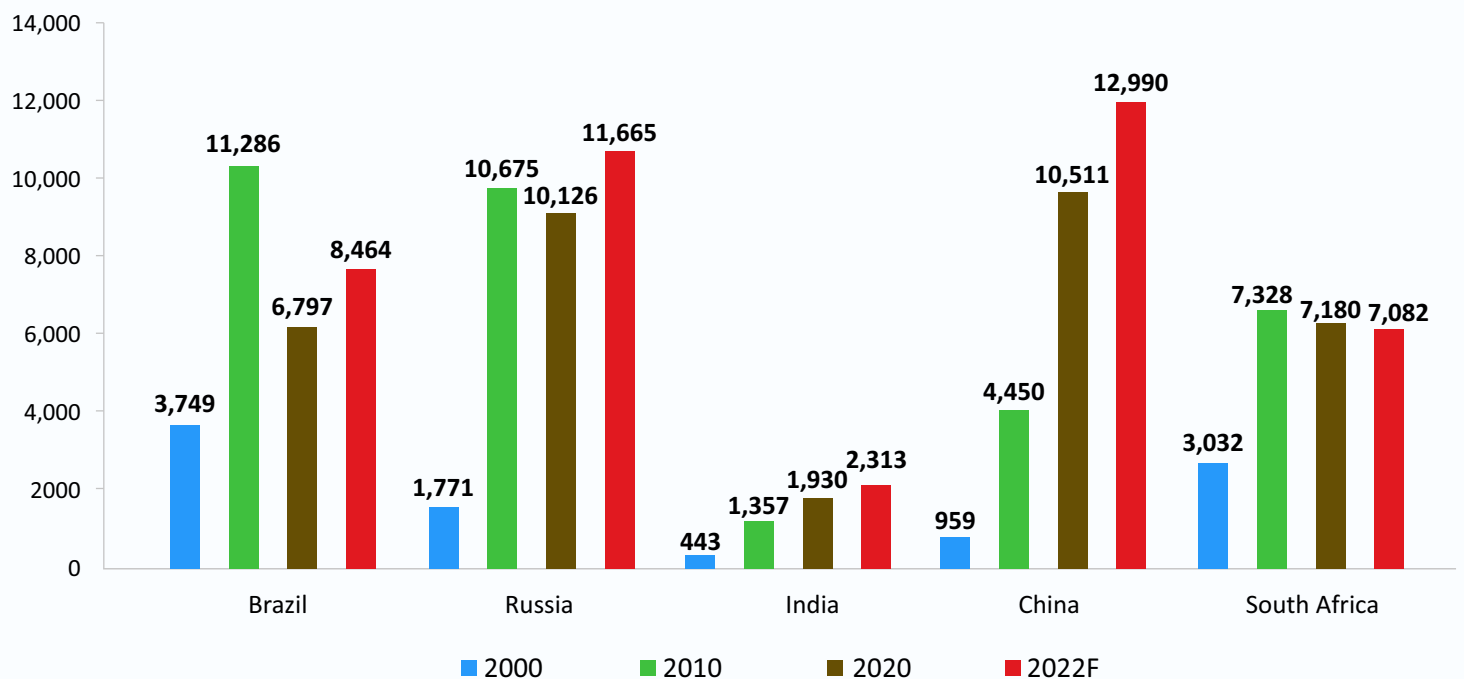
MACRO-ECONOMIC OVERVIEW

GDP & Real GDP Growth Rate in India



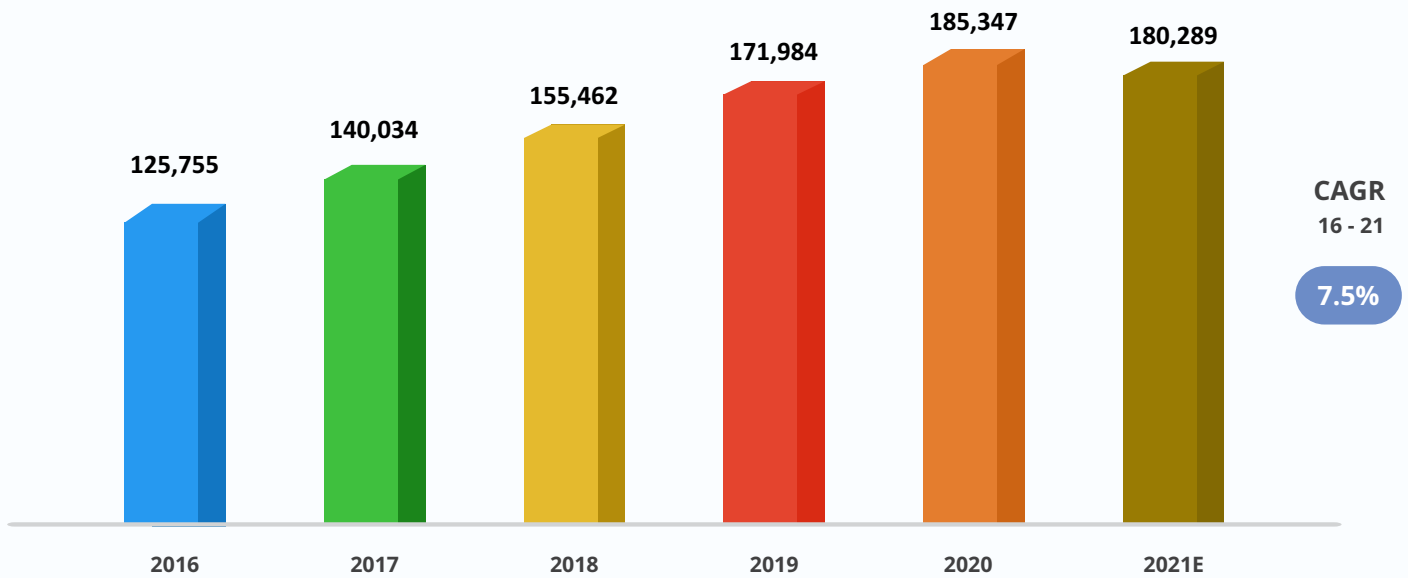
Notes: Data refer to Calendar Year
Source: IMF

BRICS - GDP per Capita (in US\$)



Source: IMF & World Bank

Net National Disposable Income in India (in INR Bn)



Source: NSO under Ministry of Statistics & Programme Implementation (MOSPI)

UPI Market in India

Value (in INR Bn)

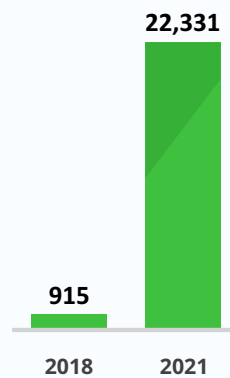


CAGR
18 - 21

234.3%

Value (in INR Bn)

Volume (in Mn Transactions)



CAGR
18 - 21

190.1%

Volume (in Mn transactions)

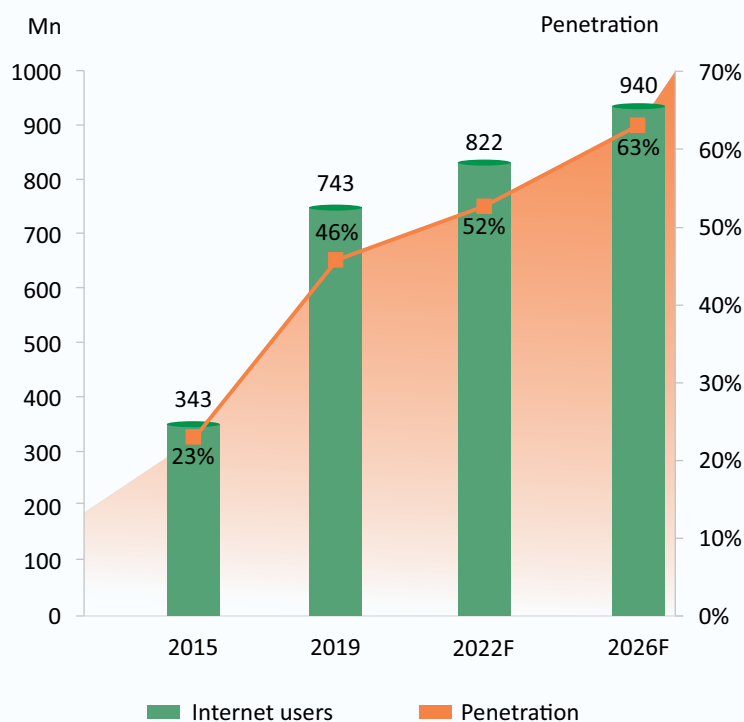
Note: Data refer to fiscal year starting in April
Source: RBI



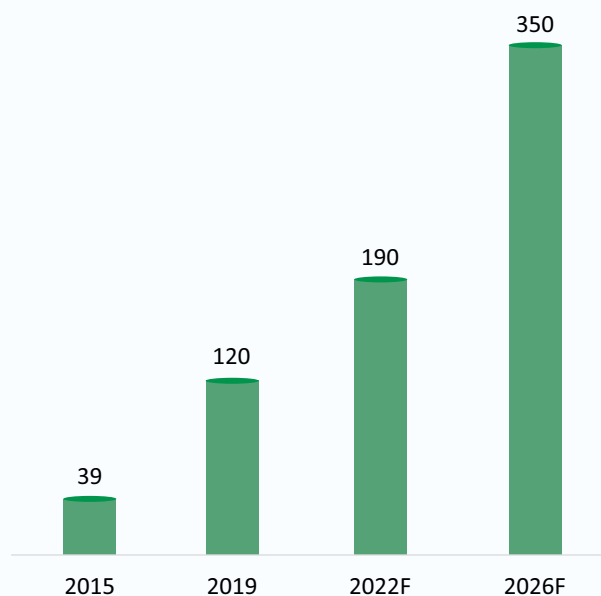
INTERNET LANDSCAPE

India has the 2nd largest Internet User Base

Internet Users & Penetration¹



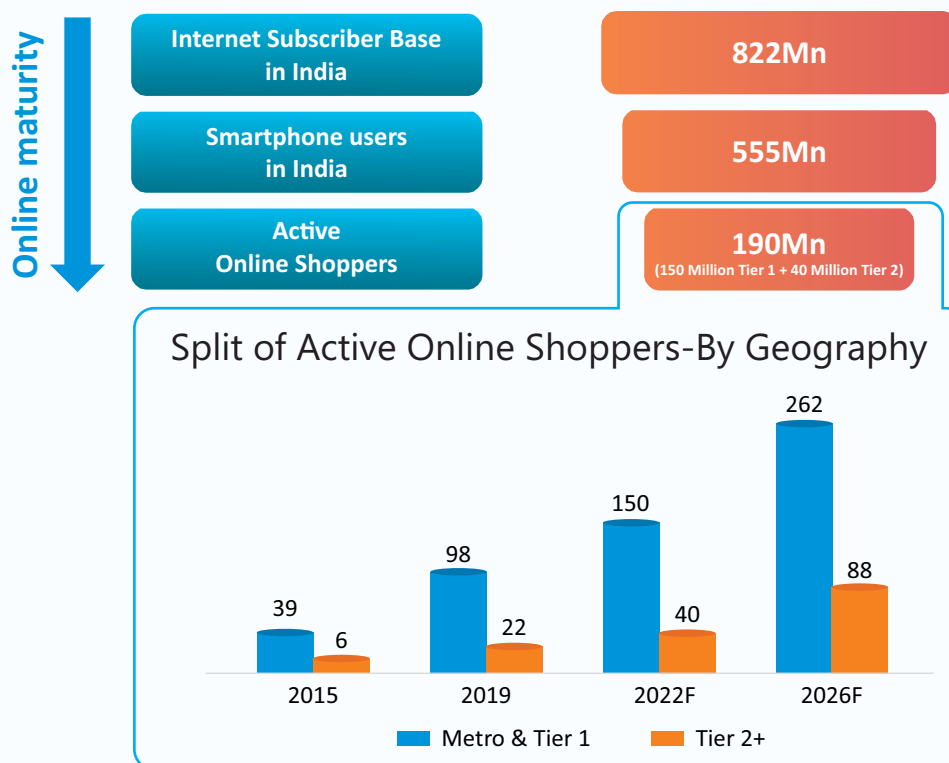
E-commerce Users (Mn)



Note: 1) As % of population

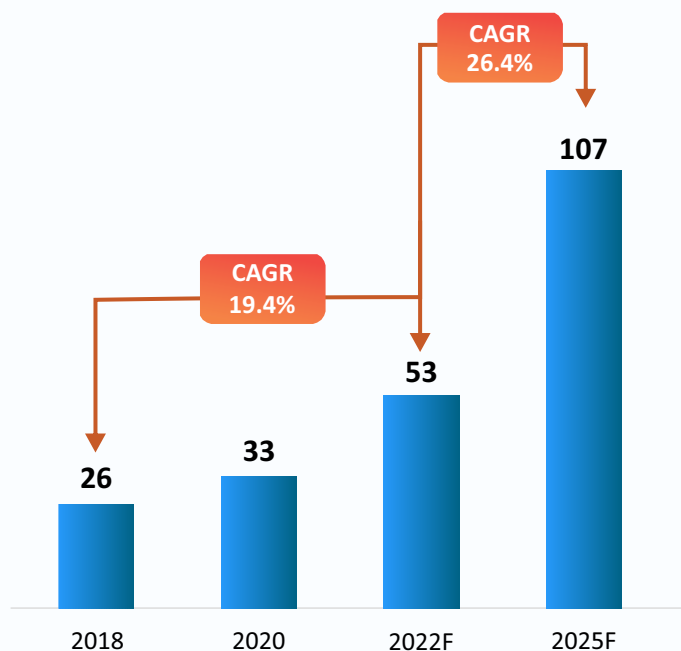
Source: Grant Thornton Analysis

Funnel of Internet Subscribers to Active Shoppers, CY'22 (Forecast)



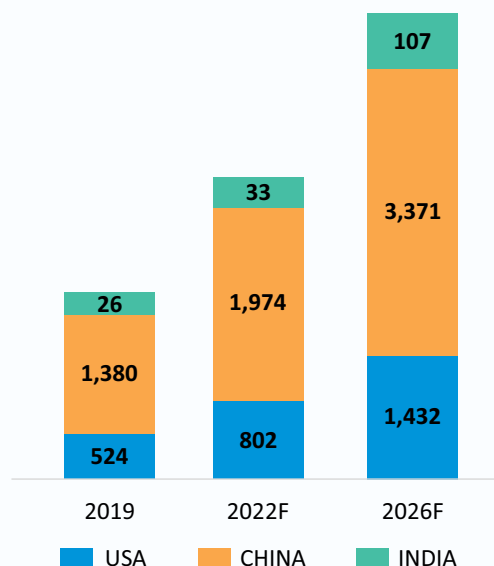
Source: Grant Thornton Analysis

Indian E-commerce Market (\$ Bn)



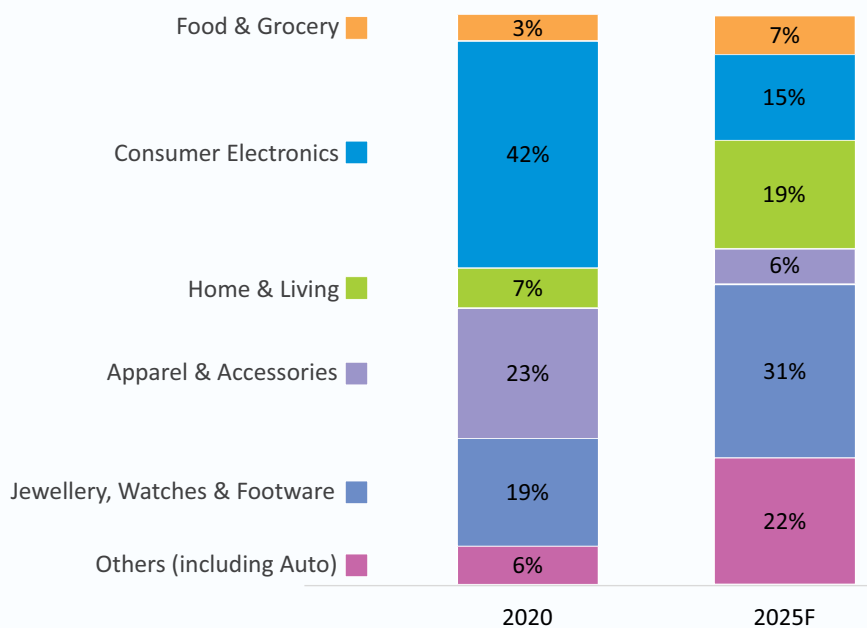
Source: Grant Thornton Analysis

E-commerce Market Size for the USA, China & India (\$ Bn)



Source: Grant Thornton Analysis

Indian E-commerce Market Split

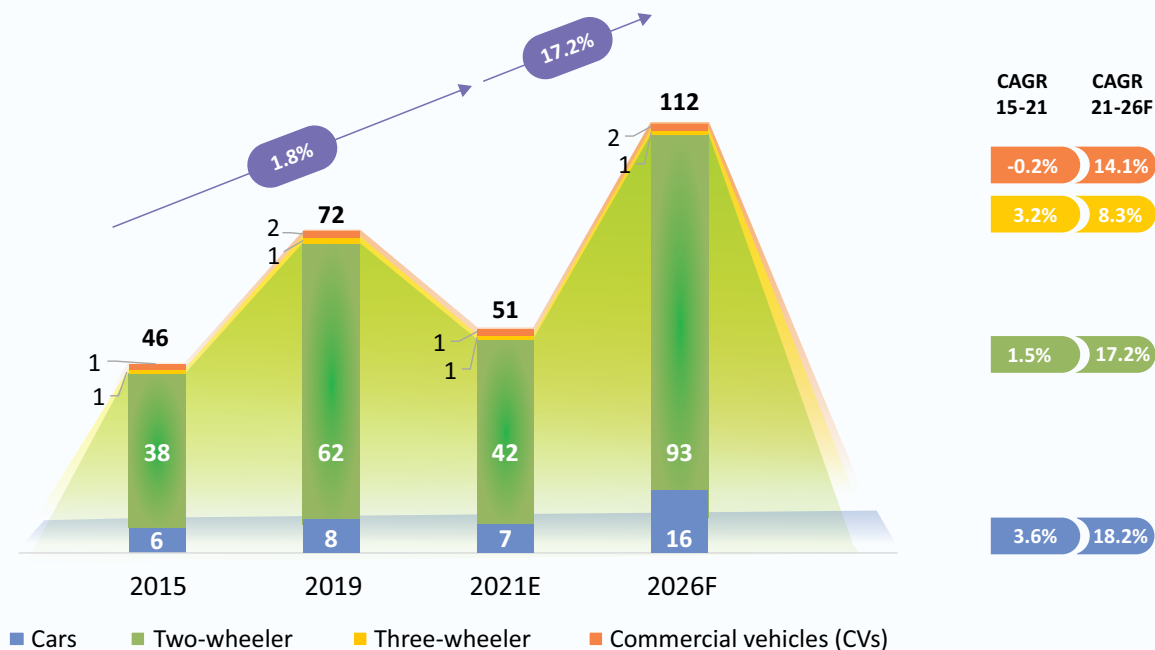


Source: Grant Thornton Analysis



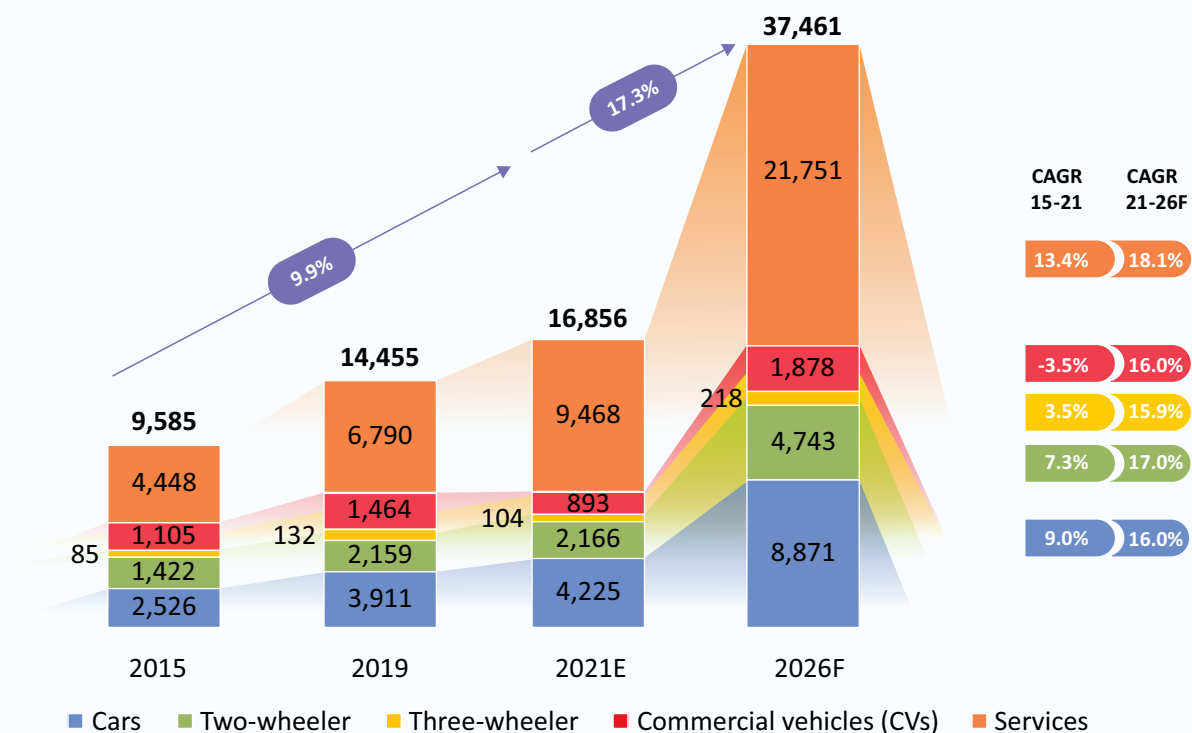
AUTO MARKET IN INDIA

Auto Market in India (Sales, Mn units)



Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

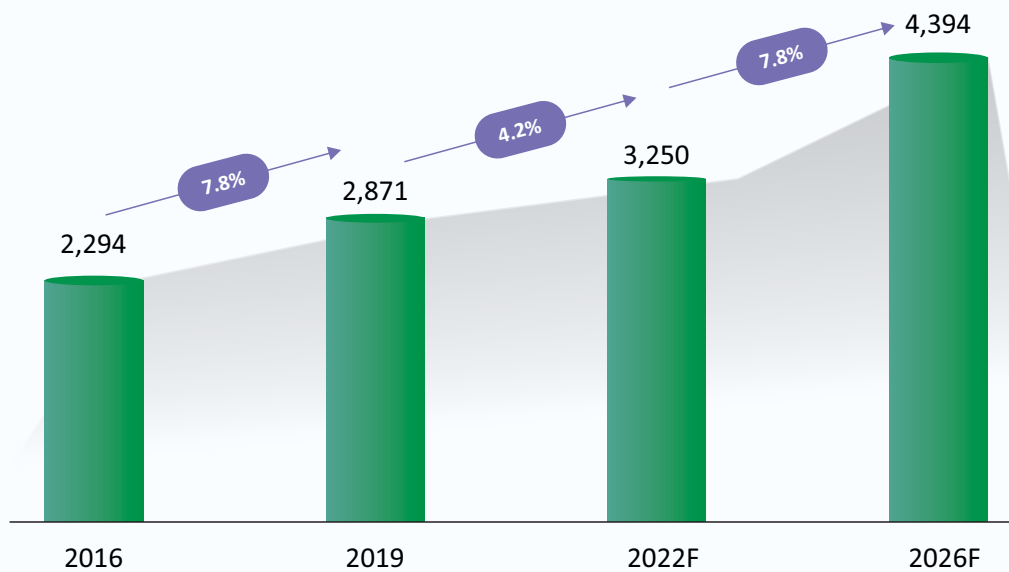
Auto Market in India (in INR Bn)



Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

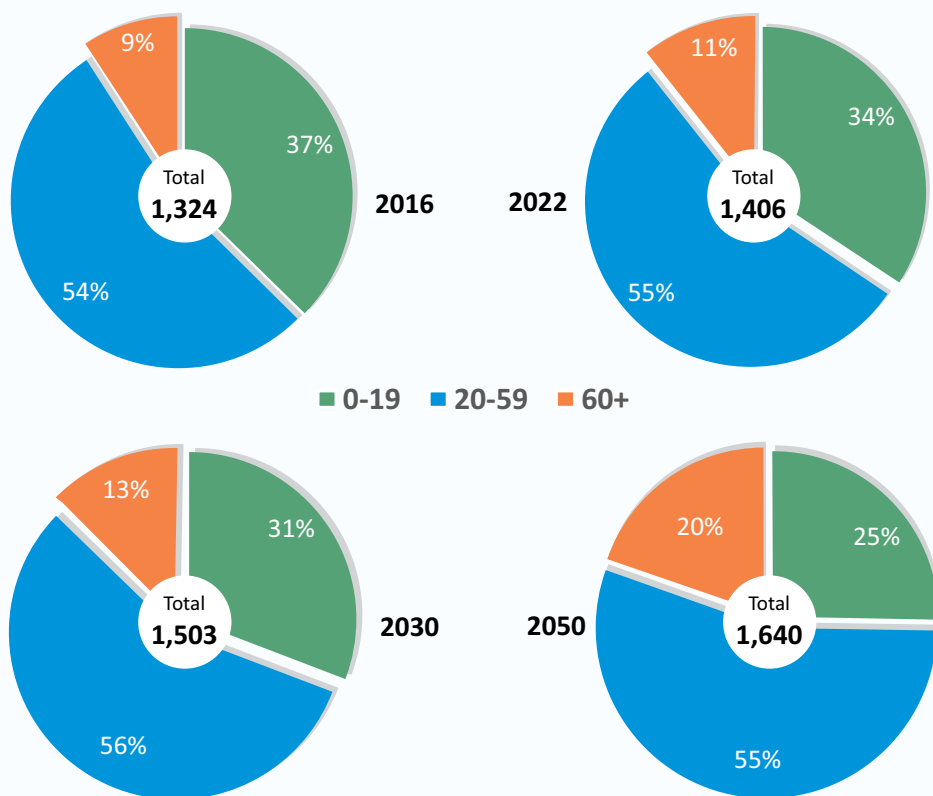
Drivers for Automobile Growth in India

India to become a **\$3 Tn economy** by 2022...



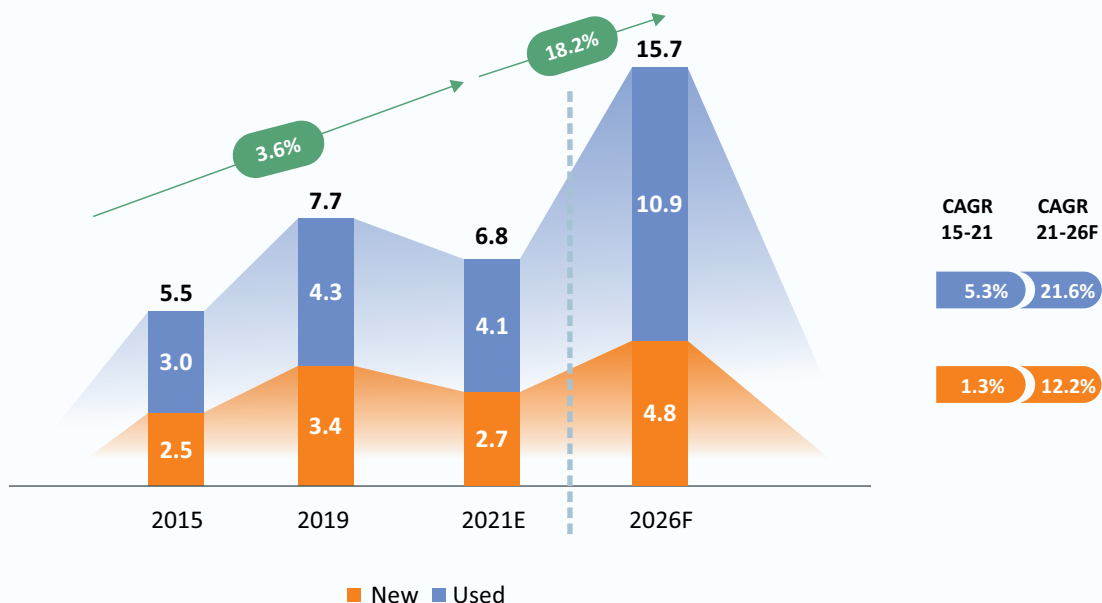
Note: Figures in \$ Bn.
Source: Grant Thornton Analysis

Working Age Population account for 55% of Population



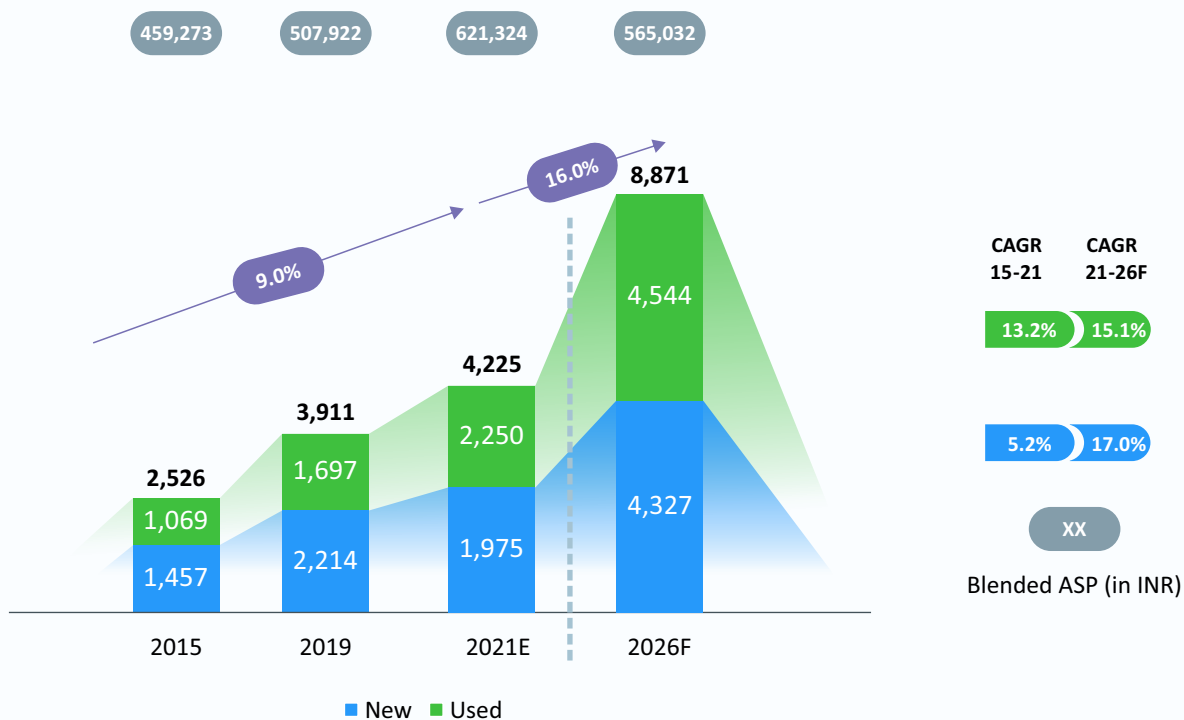
Source: Grant Thornton Analysis

Cars Market in India (Mn Units)



Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

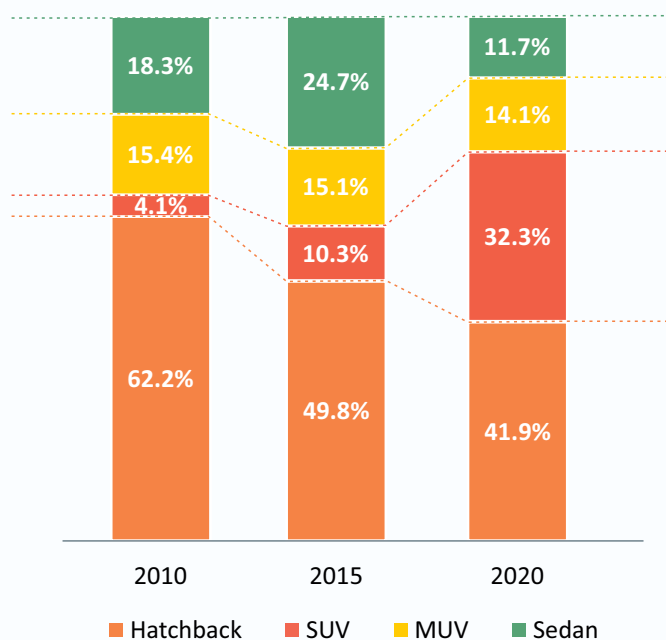
Cars Market in India (in INR Bn)



Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

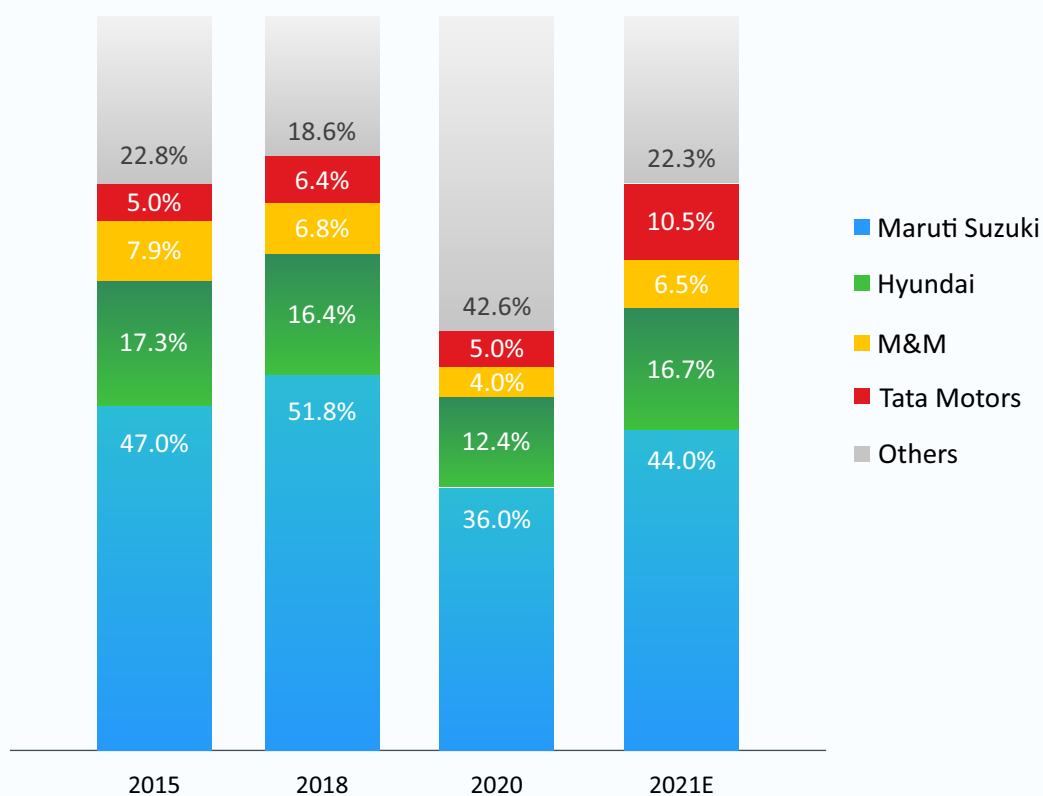
New Cars Sales Mix (Units %)

By Body Type (Units %)



Source: FADA Research

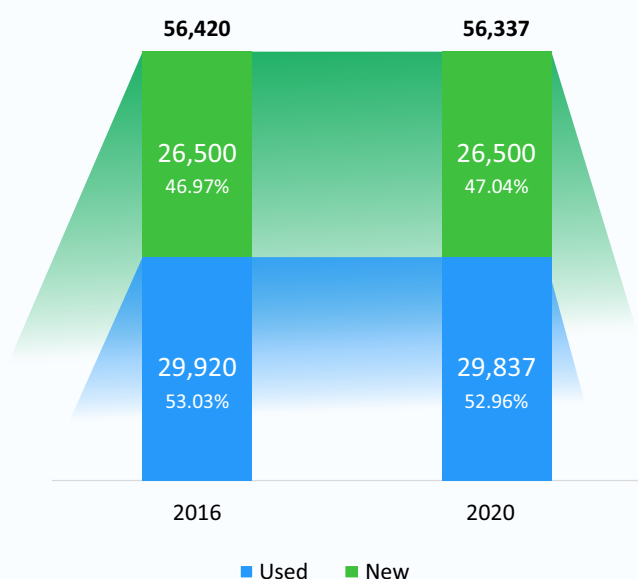
Cars OEM's Market Share (New Units)



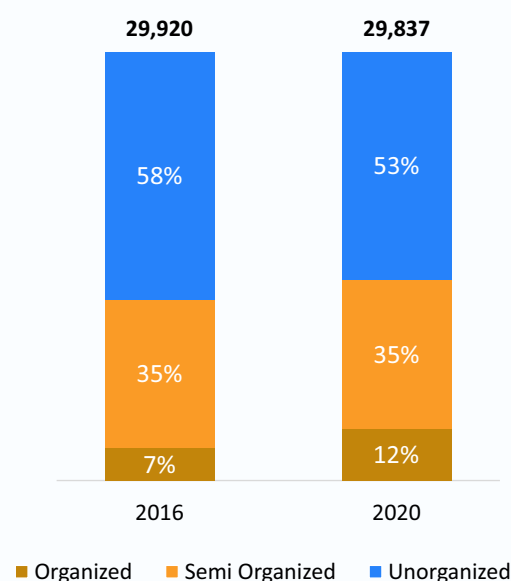
Source: FADA Research & Droom Analysis

Car Dealers in India

Dealer's Landscape in India

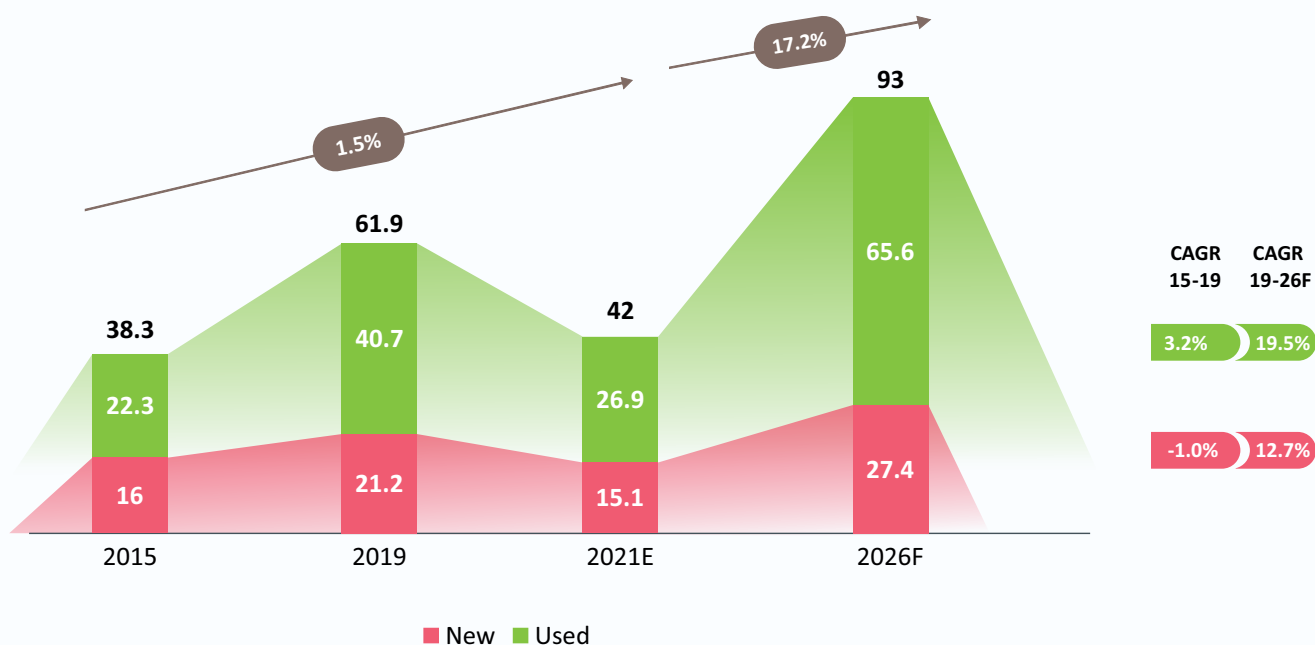


Note: Data refers to fiscal year starting in April
Source: Grant Thornton Analysis



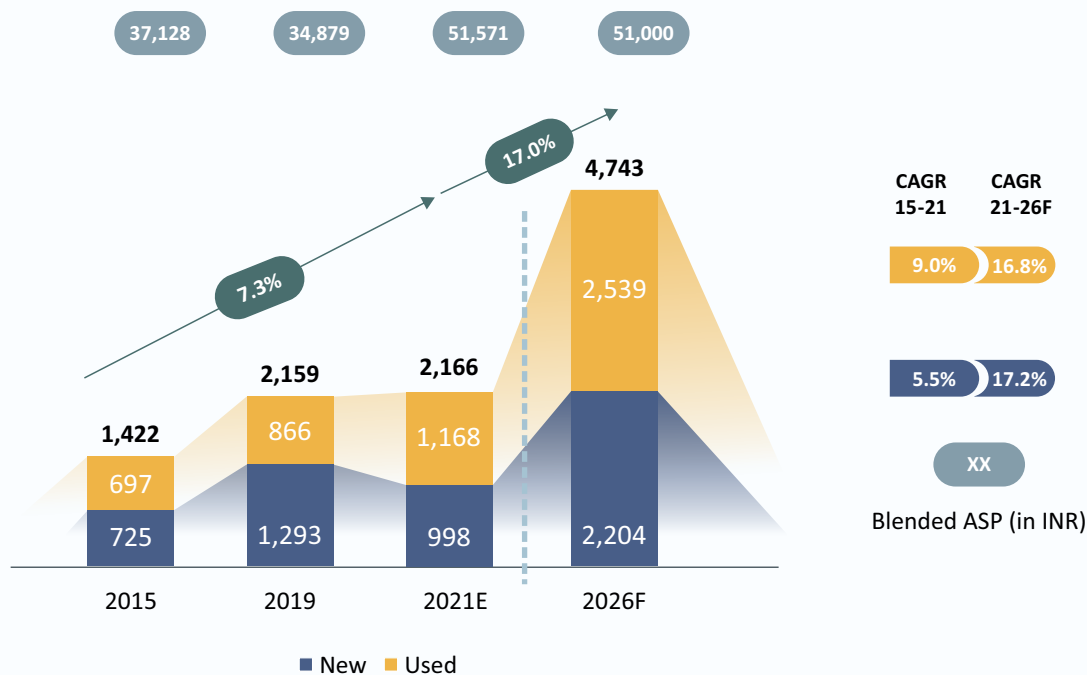
Note: 1) Data refers to fiscal year starting in April
Source: Grant Thornton Analysis

Two-Wheeler Market in India (Mn Units)



Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

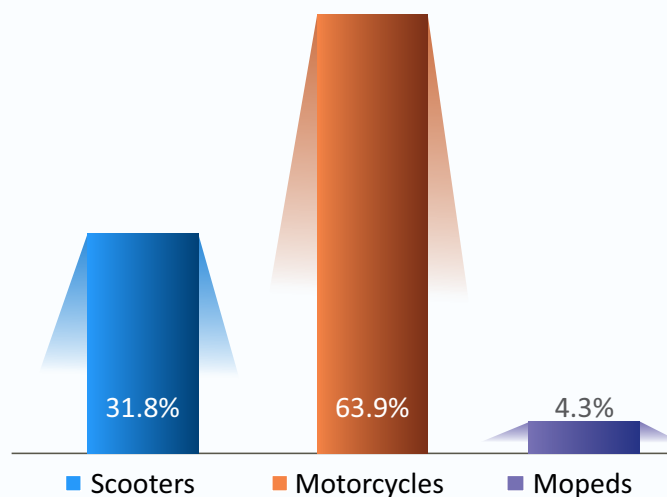
Two-Wheeler Market in India (in INR Bn)



Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

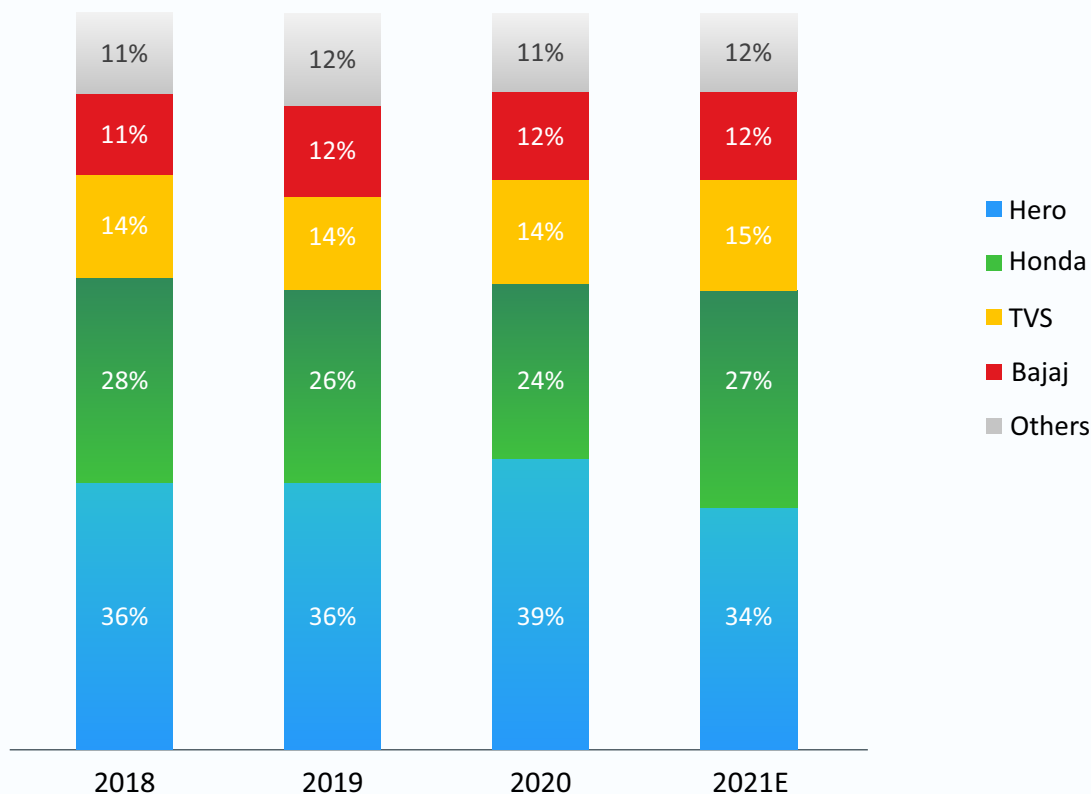
New Two-Wheeler Sales Mix - CY'2016 - CY'2020

By Body Type (Units %)



Source: FADA Research

Two Wheeler – OEM Market Share (New Units)



Source: FADA Research & Droom Analysis

Increasing Auto Finance Penetration & Proliferation of EVs will shape the Industry going forward

1 Auto Finance Business of NBFCs in India is expected to grow @ 15% by FY'20 on the back of better macro economic environment and government's focus on infrastructure and rural areas

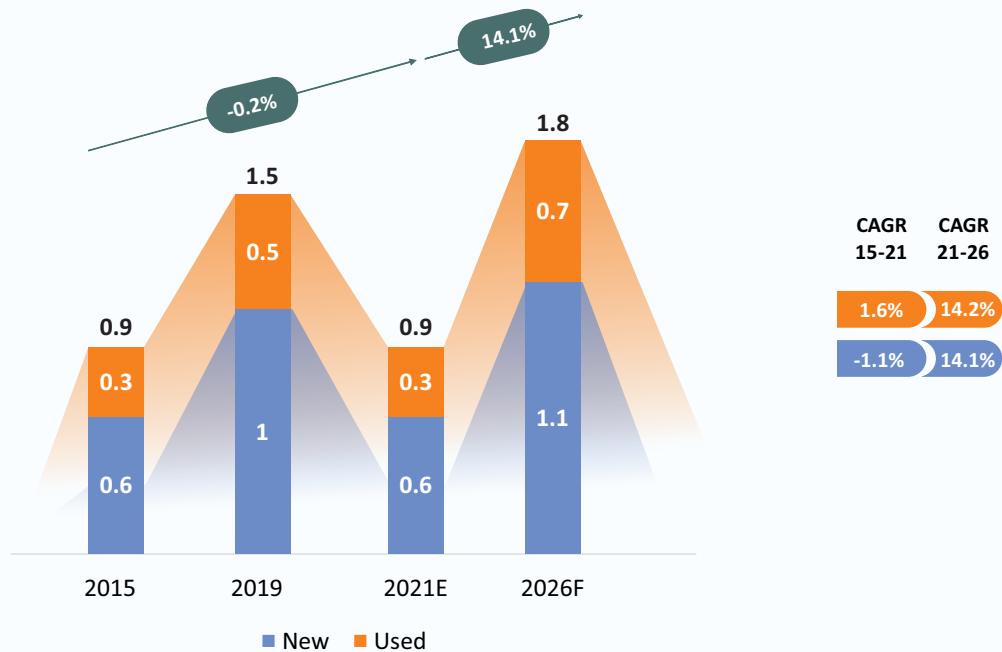
2 Total Sales of Evs in India is expected to increase from 0.9 million units in 2020 to 22.2 million in 2030, witnessing a CAGR of 37.8% during the same period

3 Average Duration of Ownership of a Car & Bike has reduced to 3-5 years in 2019 from 4-6 years in 2015

4 Within four-wheeler segment, there is a mix shift towards SUVs, with SUVs accounting for 35% of sales in 2020 compared with 15% in 2005

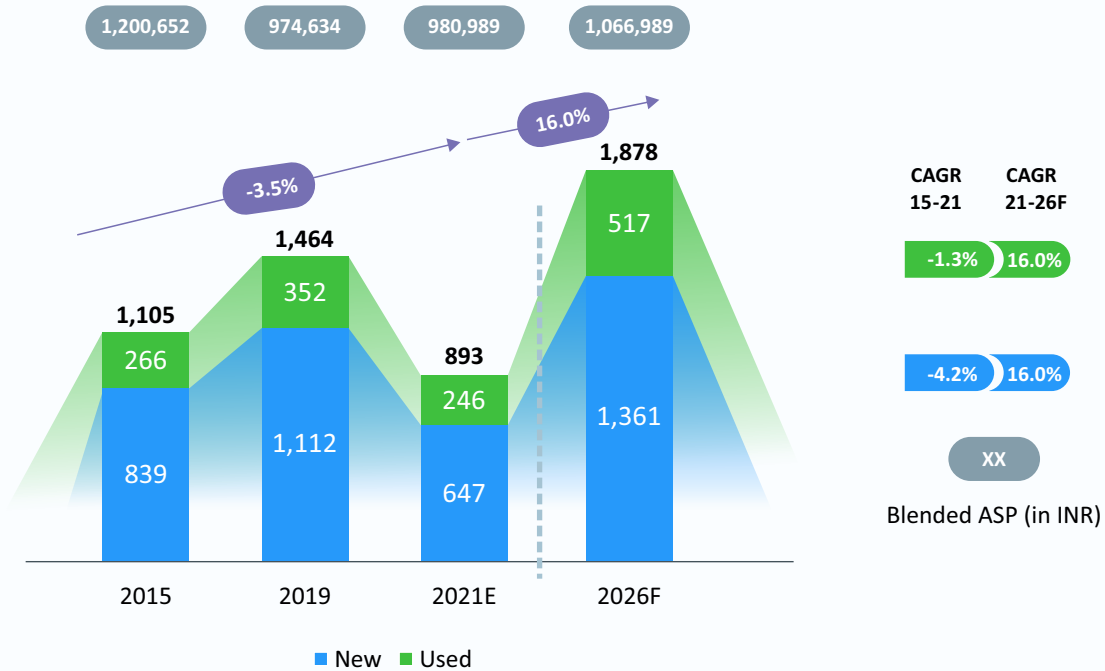
Source: Grant Thornton Analysis

Commercial Vehicles (CV) Market in India (Mn Units)



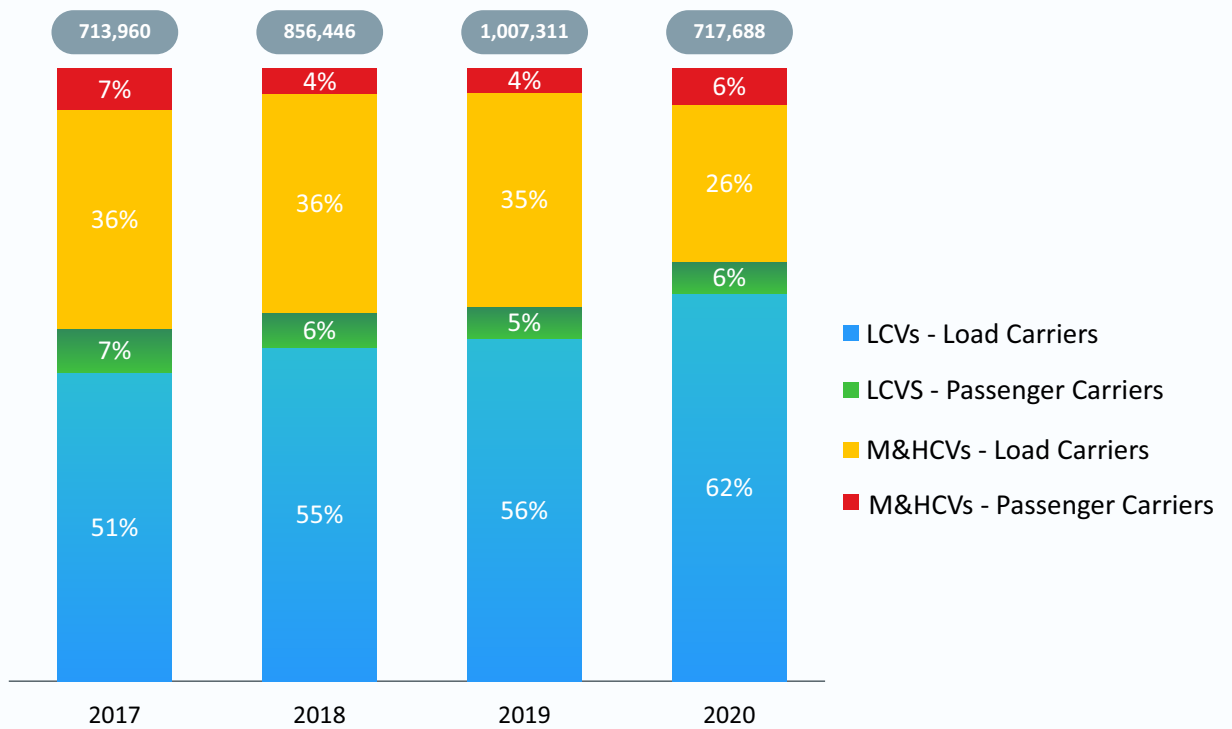
Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

Commercial Vehicles (CV) Market in India (in INR Bn)



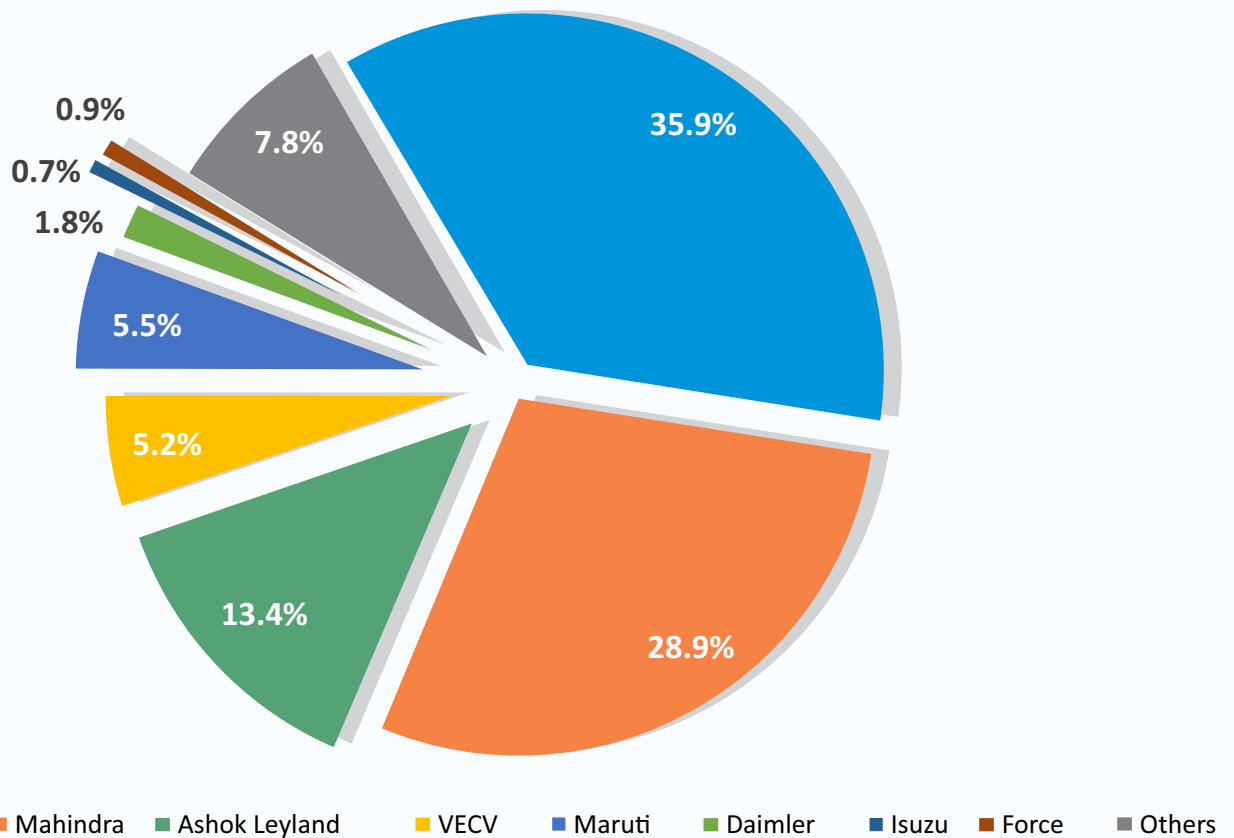
Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

Commercial Vehicles (CV) – Market Share and Sales Mix



Source: FADA Research

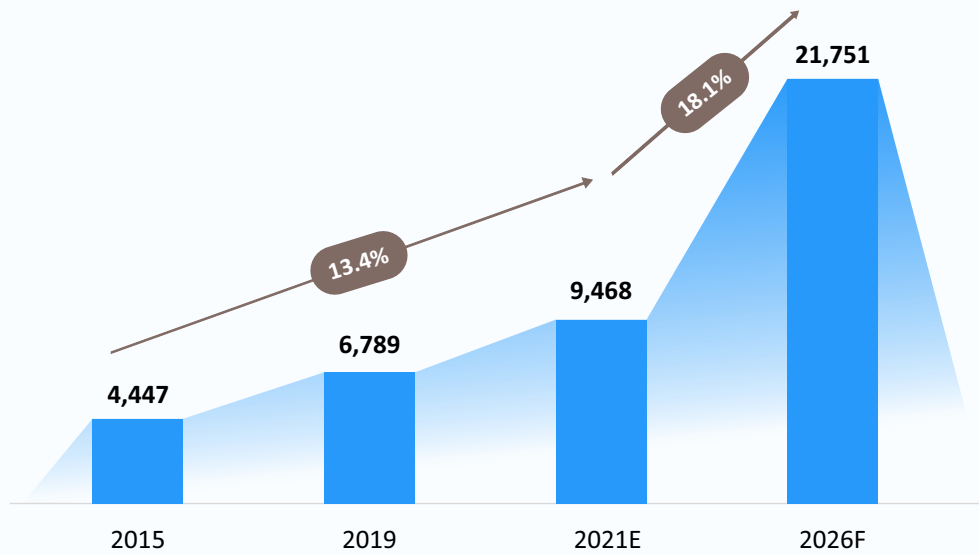
CV Retail Sales for FY'21



Source: FADA Research

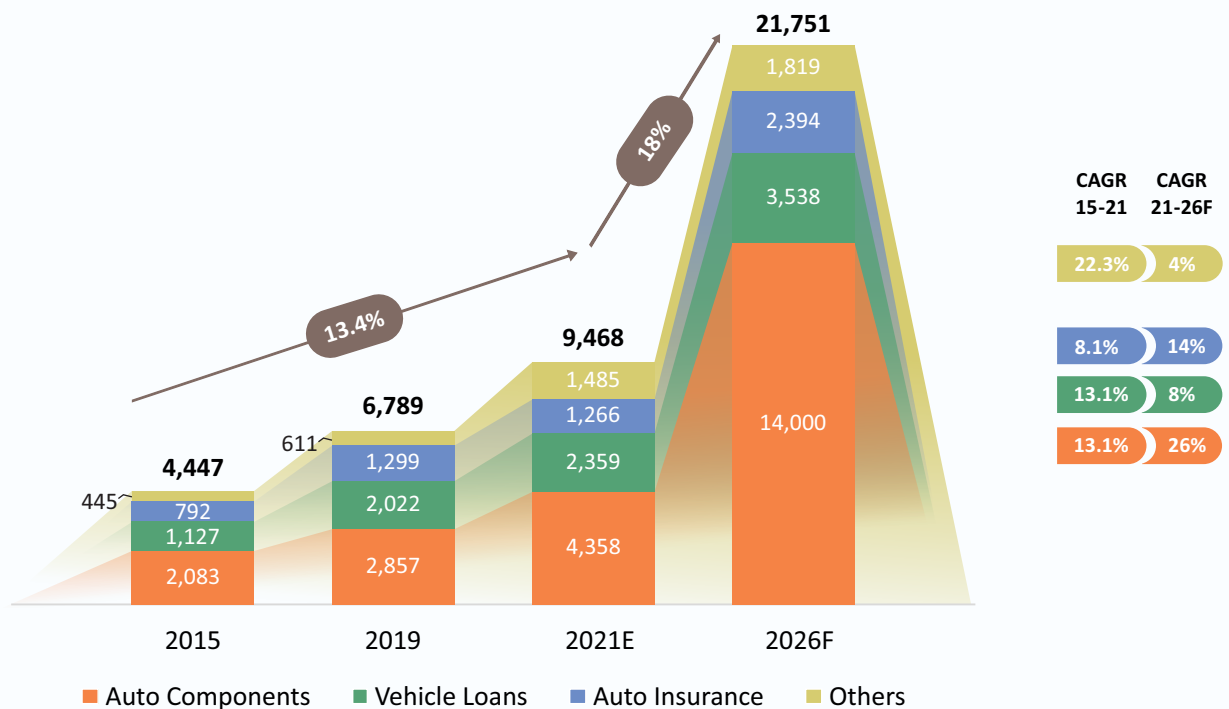
Auto Services Market in India (in INR Bn)

Auto Service Market Split by Category



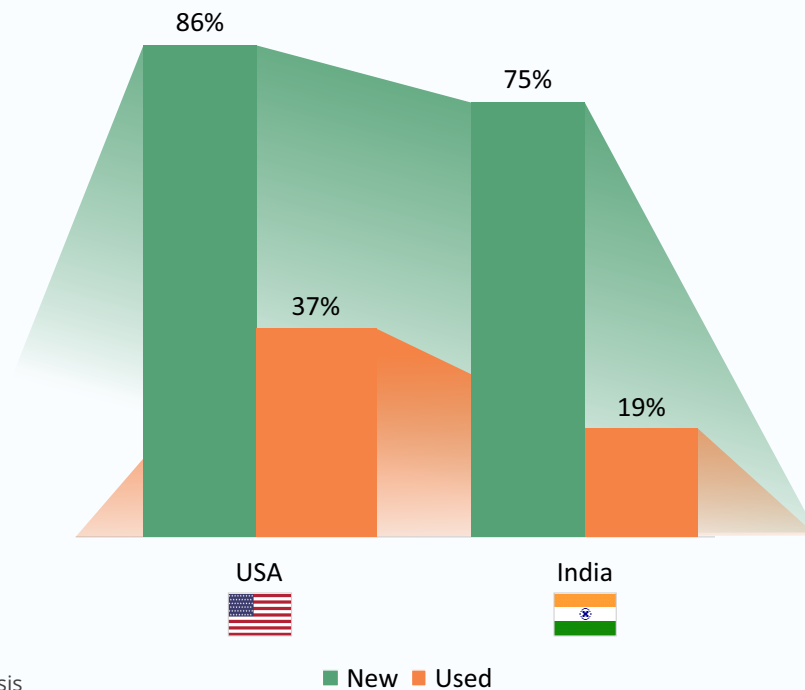
Note: Data refers to fiscal year starting in April
Source: Grant Thornton & Droom Analysis

Auto Services Market Split (in INR Bn)



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: Grant Thornton & Droom Analysis

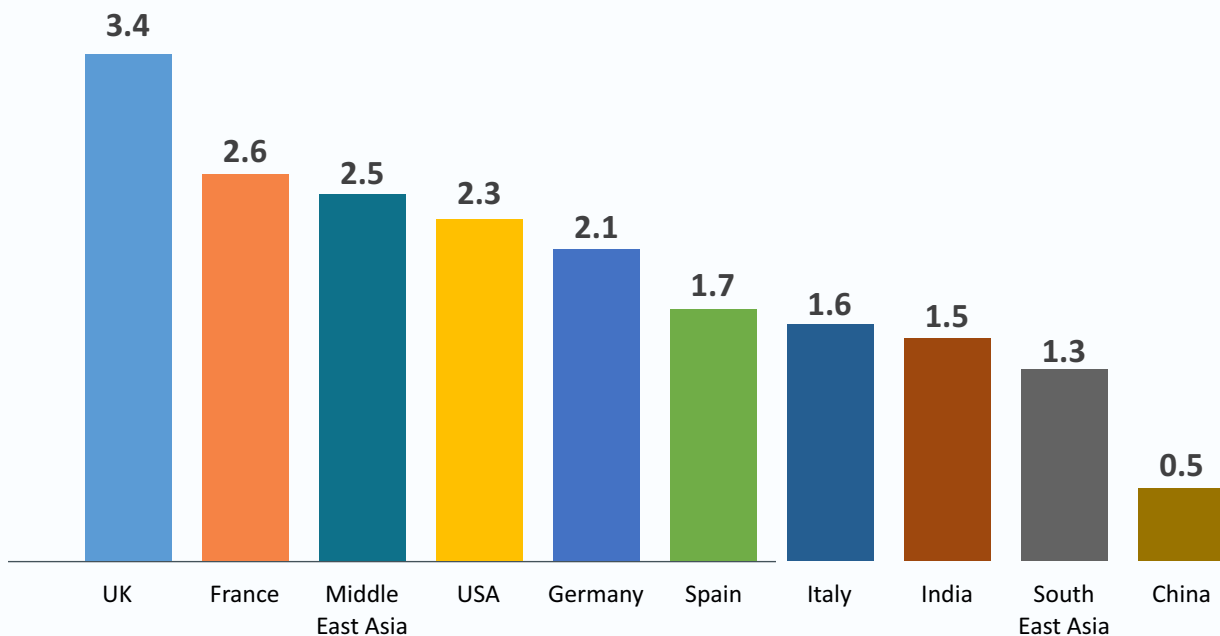
Car Finance Penetration in India & US for Used & New Passenger Cars, CY'20



Source: Grant Thornton Analysis

New Vs Used Ratio For Different Countries

Used to New Passenger Car Ratio, Global Comparison (FY'21)

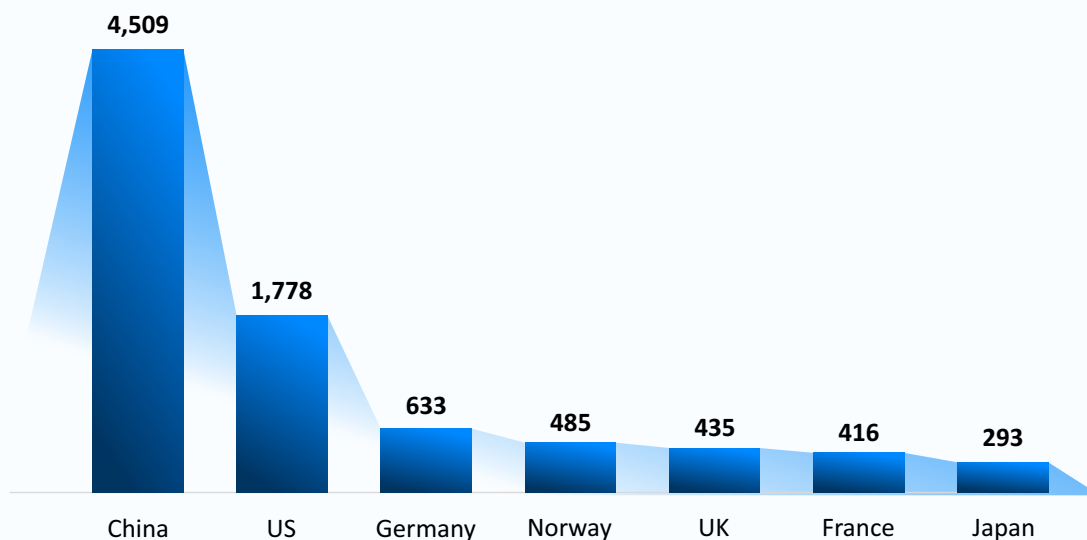


Source: Grant Thornton Analysis



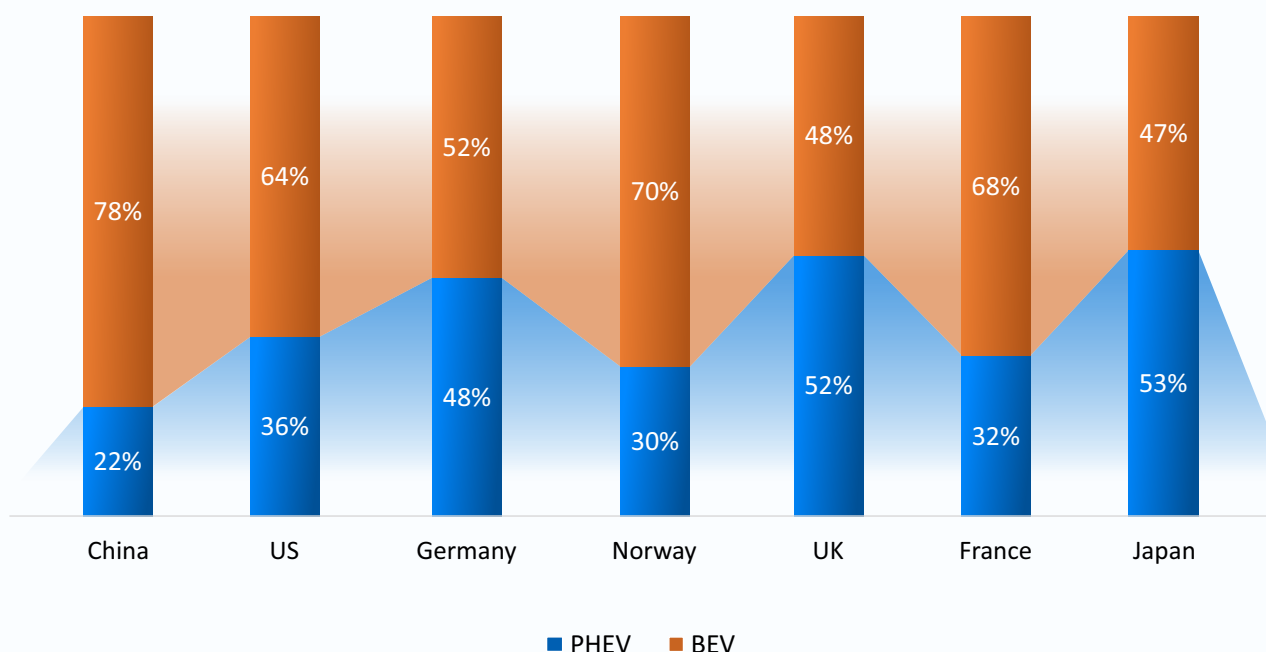
EV MARKET IN INDIA & THE WORLD

Estimated Number of Plug-in EVs in use in Selected Countries as of 2020 (in 1,000 Units)



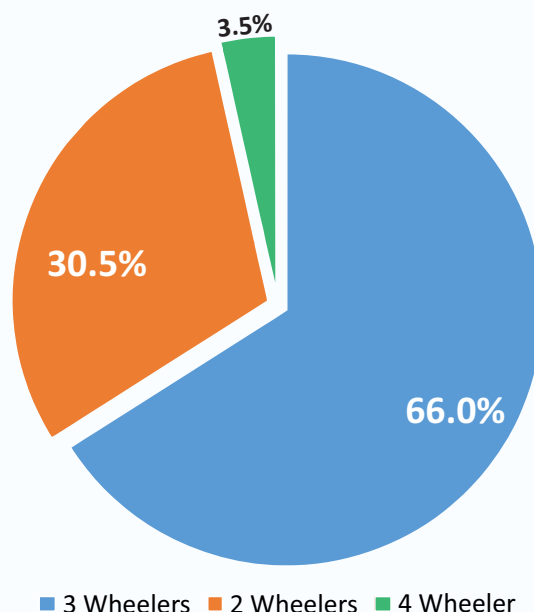
Source: Statista

PHEV vs BEV in Selected Countries



Source: Statista

EV Sales in India (FY'21) (133,831 Units)



Source: CEEW CEF

Drivers of EV Market in India

1 FAME 2 - The Union Cabinet approved the proposal for the Implementation of a Program titled "Faster Adoption & Manufacturing of Evs in India Phase 2 with a total budget of INR 100 Billion. The Duration of the program is three years with effect from April 1, 2019

2 Amendment to Model Building By-Laws -according to the amendments, any charging station installed at a public or private area or building premises of any category that caters to the commercial mode of charging of EVs will be considered as a "Public Charging Station

3 No License Required - The Ministry of Power has issued a clarification stating that no license is required to operate EV charging stations in India. The reasoning for making it license-free is that the government considers EV charging station as a service and not the sale of electricity

4 Transfer of Technology - Recently, Vikram Sarabhai Space Centre (VSSC), a part of Indian Space Research Organization (ISRO), invited applications regarding the Request for Qualification for the commercialization of its indigenously developed Li-ion cell technology. So far, ten firms have been shortlisted for the transfer of technology

5 Green Number Plate - The Ministry of Road Transport & Highways has announced that that battery-operated vehicles, both private and commercial, will be given green license plates

6 Permits Not Required - The Ministry of Road Transport and Highways also announced that all battery-operated, ethanol-powered and methanol-powered transport vehicles would be exempted from the requirement of permits



Impact of COVID-19 on the E-commerce market in India

1 Structural Shift in Shopping Behaviour

The pandemic saw more consumers exploring their new options catapulting brand loyalty within a few clicks. Brands learned that they needed a plan to be available, accessible, and continue to delight. Consumer patterns were changing rapidly, and they needed to act fast to win in the new normal

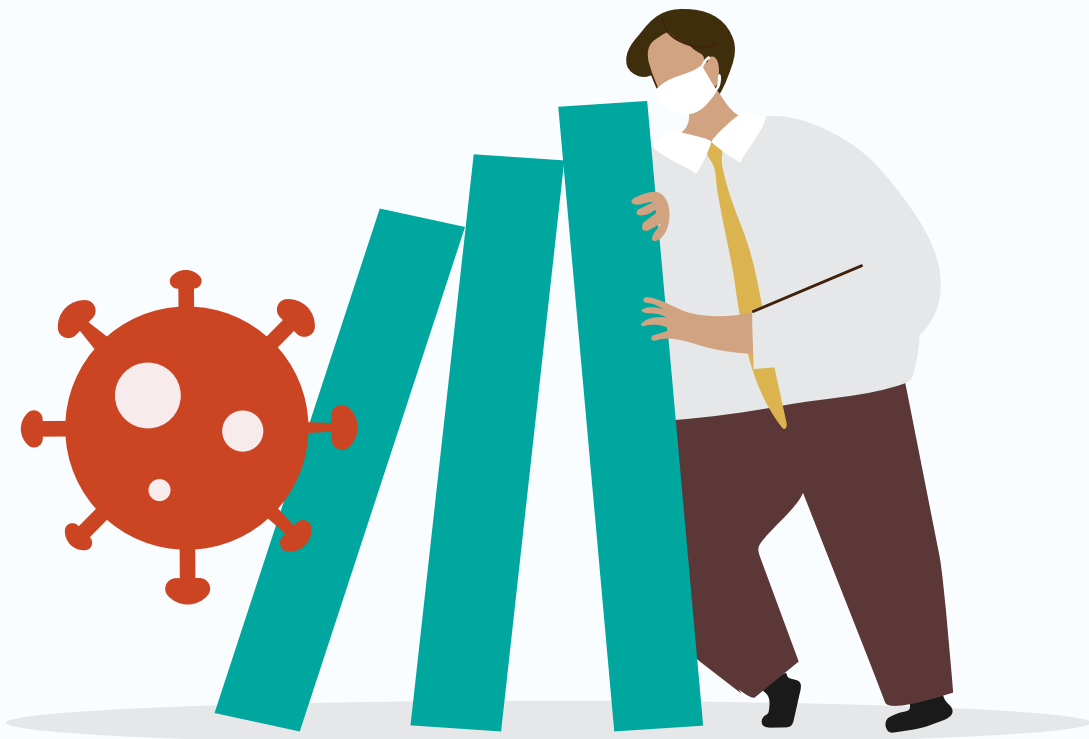
2 Increased Acceptance of Digital Payments

Outbreak of COVID-19 has triggered the increase in online transactions. Individuals are now comfortable using online platforms which was not the case earlier, hence online purchases across different e-commerce platforms have witnessed a massive boost. While hygiene was the primary reason in increase of digital payments, other factors like convenience, ease of use, acceptance, and incentives have given impetus to this adoption

3 Rise in First Time Users (FTUs) and Companies focusing on Tier 2 & 3 Cities

In India, the pandemic has led to a rise in the number of FTUs who have been so far inhibited to shop online. The pandemic has made every age group shop online. In India, for instance, cash withdrawals have fallen sharply during the pandemic. Simultaneously, though, the use of the Indian online payment platform, UPI, has risen dramatically

Leading e-commerce companies are focusing on cities beyond the metropolitan cities. Currently, Tier 2 and above contribute around 17% of the total active online shoppers in India, and this is expected to increase to 26% by CY'26



Government Policies impacting E-commerce in India

1 5G Network

Major investments made by the Government of India in rolling out fibre network for 5G will boost e-commerce. Improved internet services will enhance and improve consumers online screen time experience

2 Increase in FDI

To increase the participation of foreign players in e-commerce, the Indian Government raised the limit of foreign direct investment (FDI) to up to 100% (in B2B models). An increased influx of foreign investments will result in boosting e-commerce infrastructure and will further improve customer experience.

3 Consumer Protection Rule , 2020

Rules delineate roles and responsibilities for the marketplace and sellers and will reinforce competition and efficiency within the Indian e-commerce market. Regulation will ensure fair and transparent practices in the e-commerce sector


4 Open Network for Digital Commerce (ONDC)

Providing equal opportunities to all market players to make optimum use of the e-commerce ecosystem, the Department for Promotion of Industry and Internal Trade (DPIIT) will set protocols for cataloguing, vendor discovery, and price discovery by utilising its ONDC. Regulation will not only add quality and transparency but competitive placement of products and services

5 Draft Ecommerce (Amendment) Rules, 2021

The government has banned specific flash sales or back-to-back sales which limit customer choice, increase prices and prevent a level playing field. The rules have also introduced the concept of fallback liability under which e-commerce firms will be held liable in case a seller on their platform fails to deliver goods or services due to negligent conduct which causes loss to the customer. These rules will protect the consumers' interest, thereby providing greater trust to those shopping online.

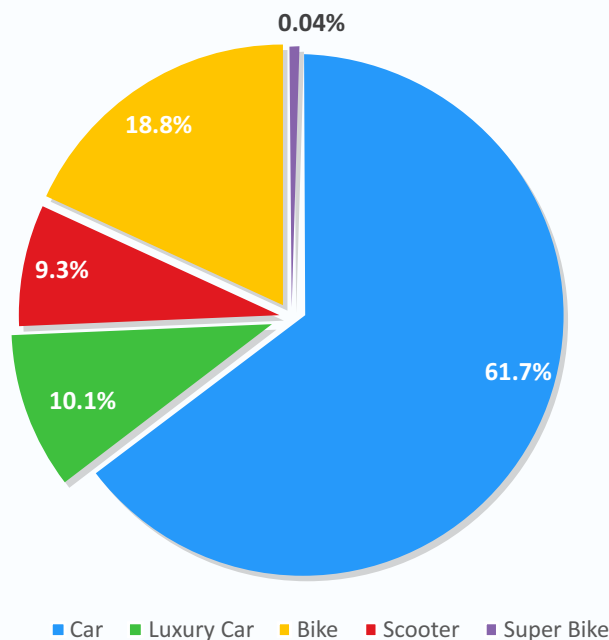




WHAT INDIA IS BUYING IN 2021

Category Mix

% breakdown based on online sales



Top 10 Best Selling by Category



Car

Hyundai Creta
Maruti Suzuki Vitara Brezza
Toyota Fortuner
Toyota Innova Crysta
Mahindra XUV 500
Maruti Suzuki Baleno
Maruti Suzuki Swift
Kia Seltos
Maruti Suzuki Ertiga
Mahindra Scorpio



Bike

Bajaj Pulsar
TVS Apache RTR
Bajaj Pulsar NS
Bajaj Avenger
Hero Splendor Plus
KTM Duke
Bajaj Pulsar RS
Hero Passion Pro
Honda CB Shine
Bajaj Discover



Scooter

Honda Activa 3G
TVS Jupiter
Suzuki Access
Honda Activa
Honda Dio
Honda Activa 5G
Yamaha Fascino
TVS Heavy Duty Super XL
Honda Activa 125
Hero Duet



Super Bike

Harley Davidson Street Rod
Kawasaki Ninja
Royal Enfield Interceptor
Hyosung GT 250R
Benelli TNT 300
Harley Davidson Street 750
Benelli TNT 600GT
Harley Davidson Fatboy
Triumph Speed Triple
Benelli 302R

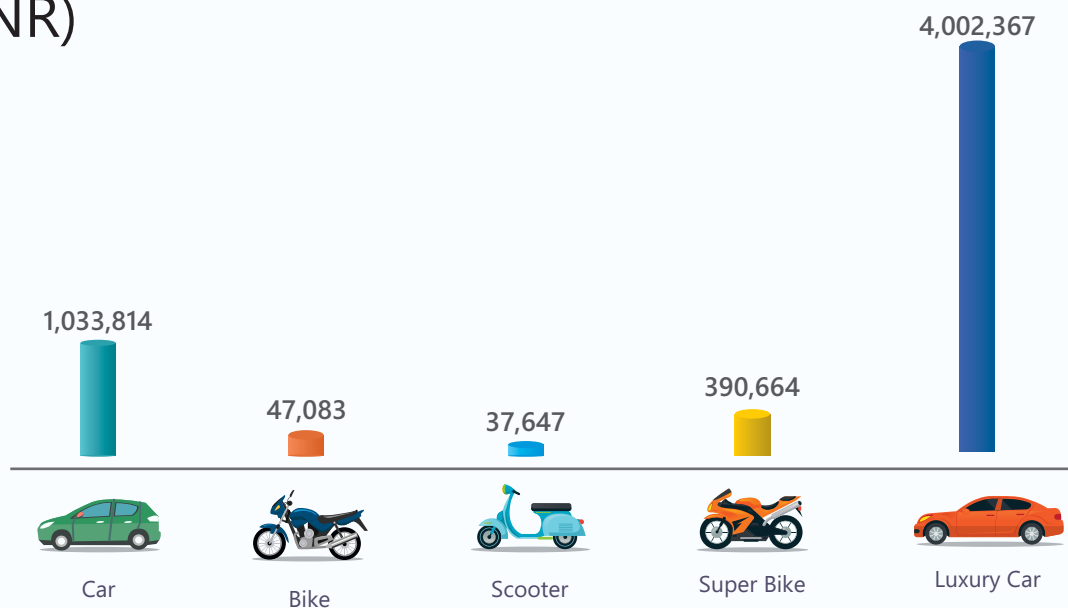


Luxury Car

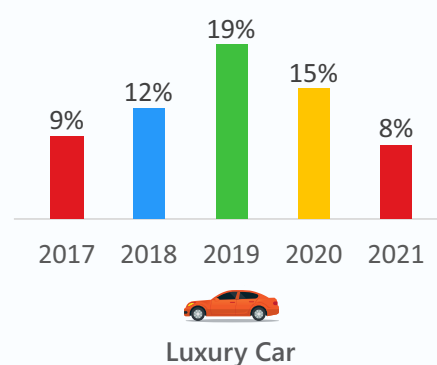
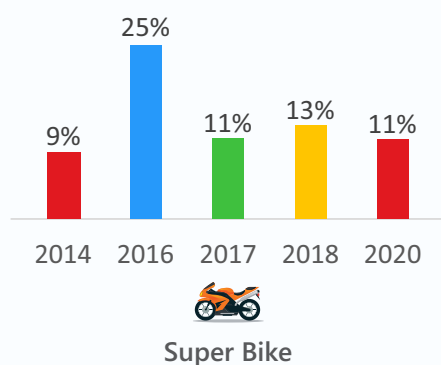
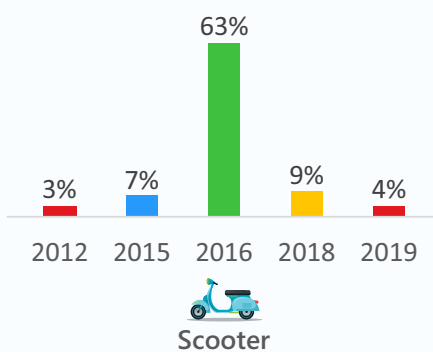
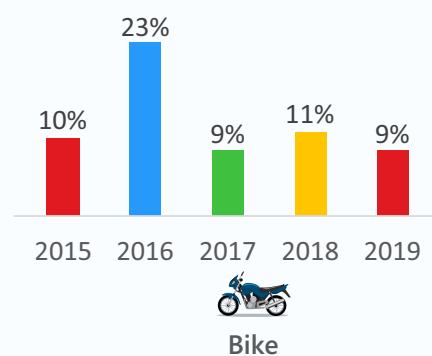
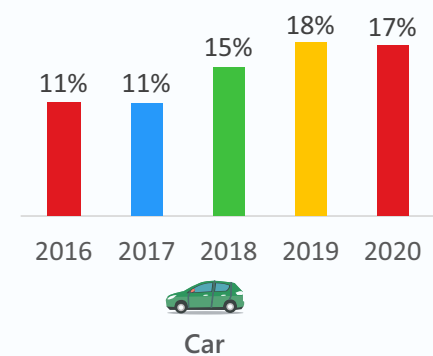
Mercedes Benz E-Class
BMW 5 Series
Mercedes Benz C Class
BMW X1
Jeep Compass
Audi A4
BMW 3 Series
Mercedes Benz GLE
Audi A6
Mercedes Benz GLC

Note: This data is based on Droom's Internal Transaction data

Average Selling Price of Used Automobiles (in INR)

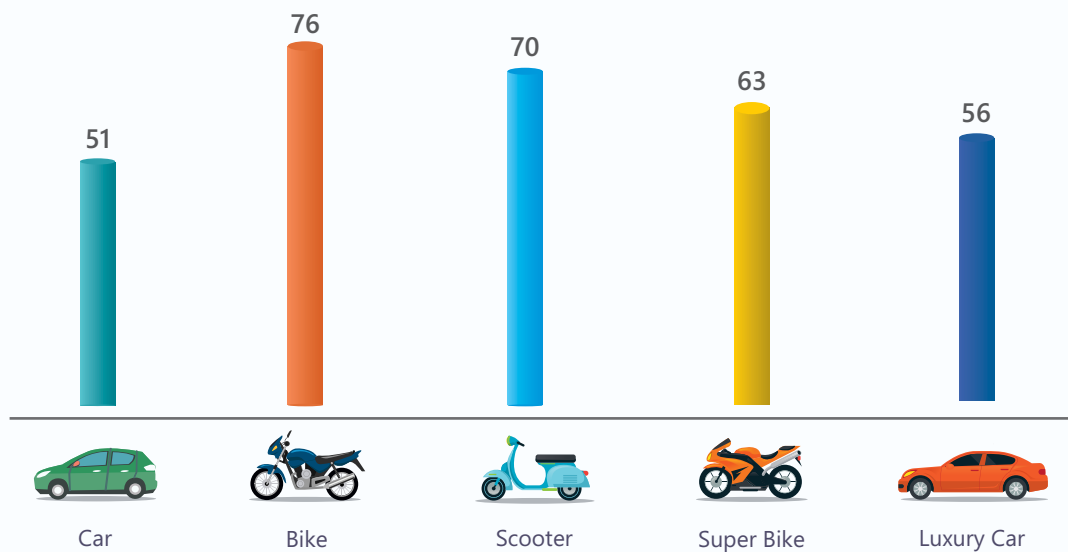


Most Popular Years by Category

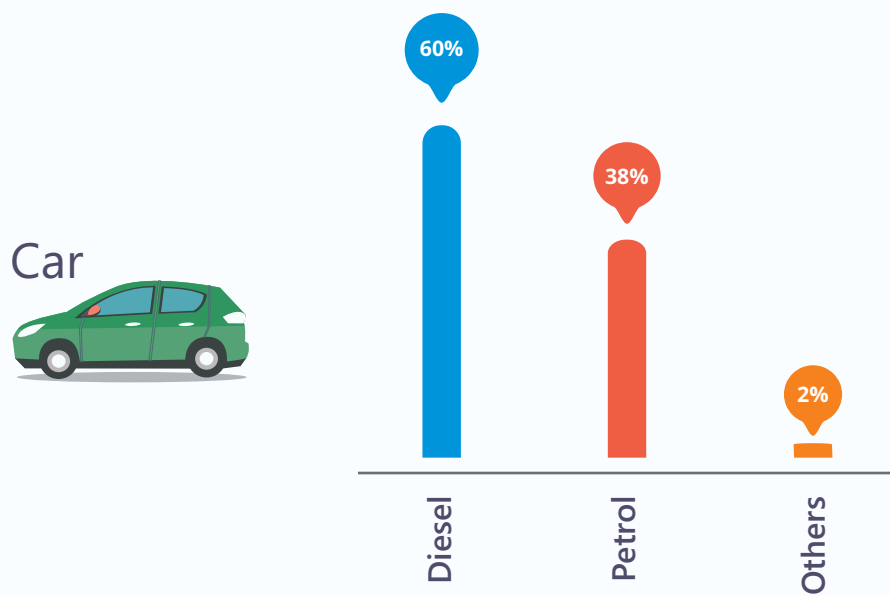


Note: This data is based on Droom's Internal Transaction data

Average Duration of Ownership by Category (in Months)

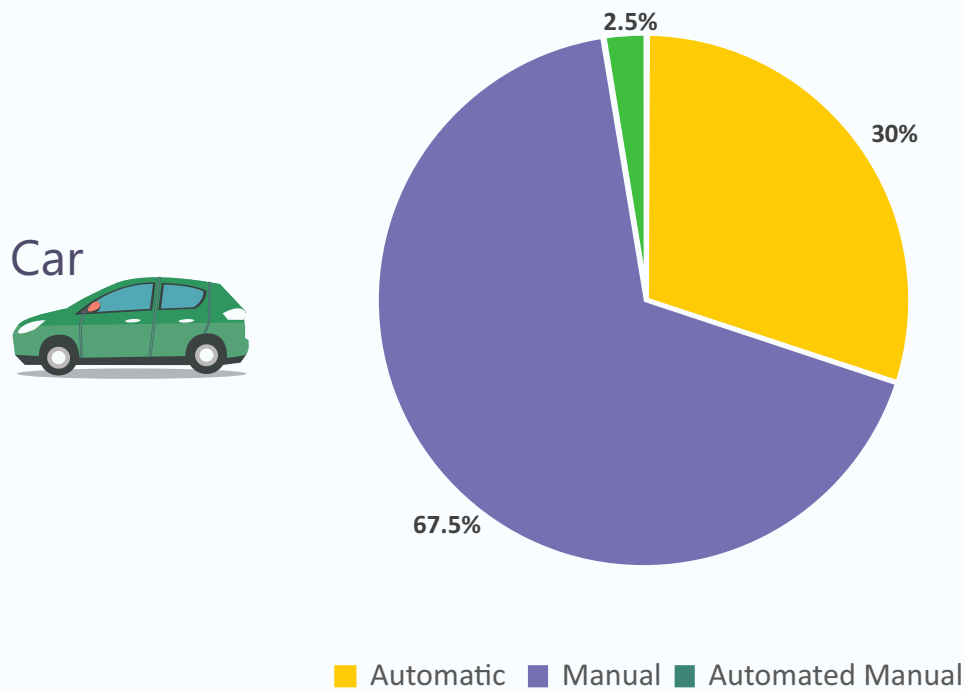


Cars by Fuel Type

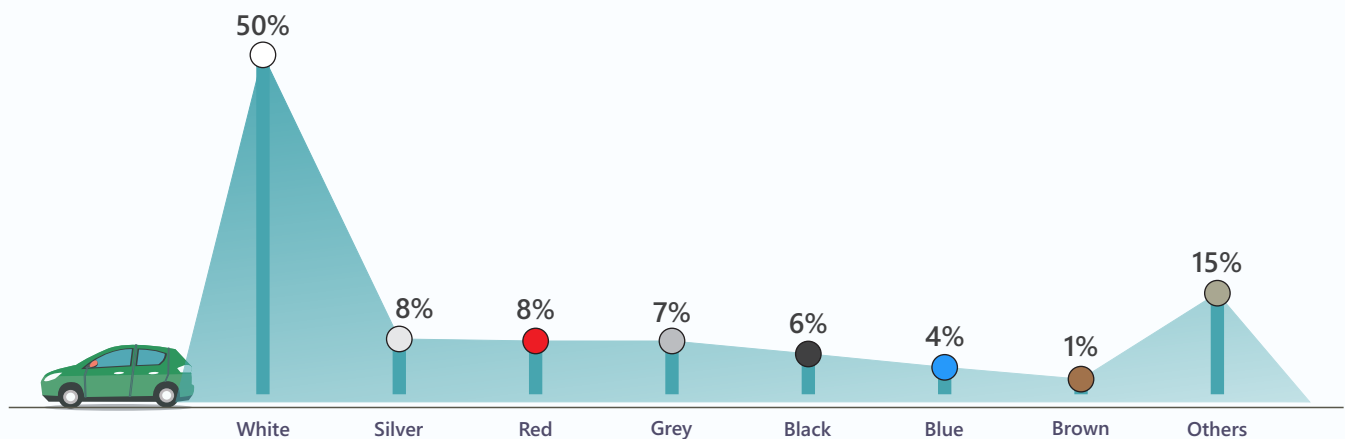


Note: Others include LPG,CNG and Hybrid cars

Cars by Transmission Type

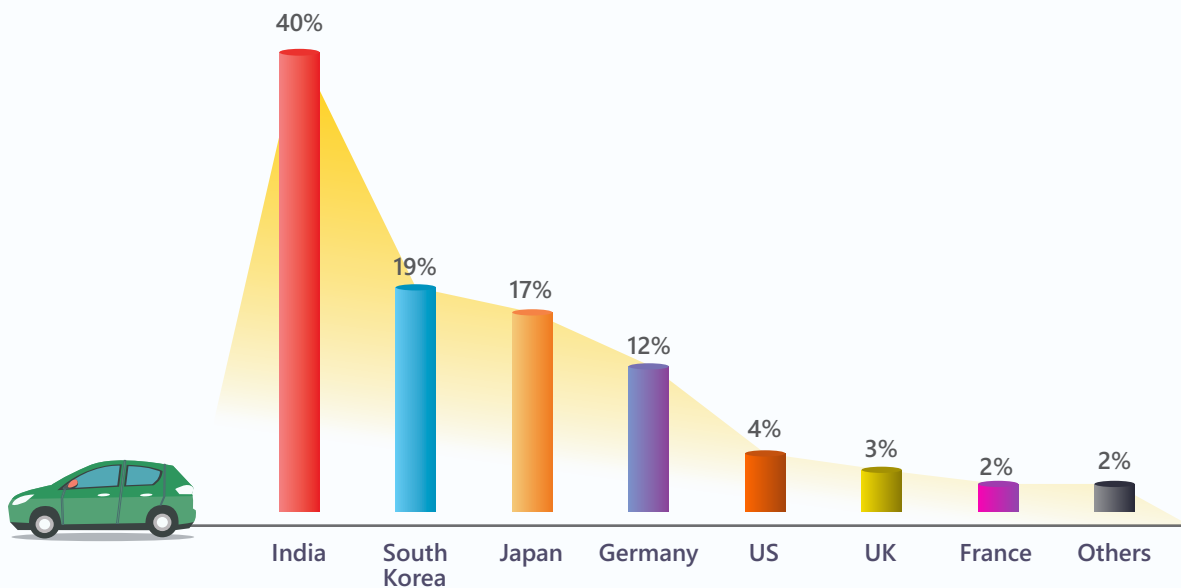


Cars by Colours



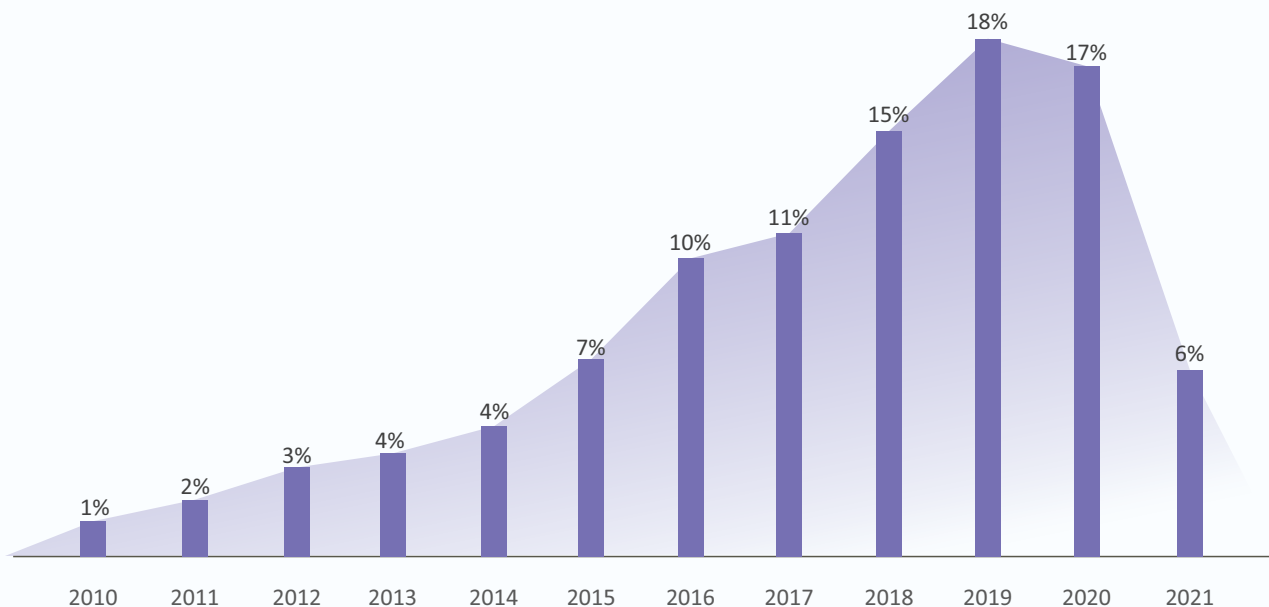
Note: This data is based on Droom's Internal Transaction data

Cars by OEM's Country of Origin



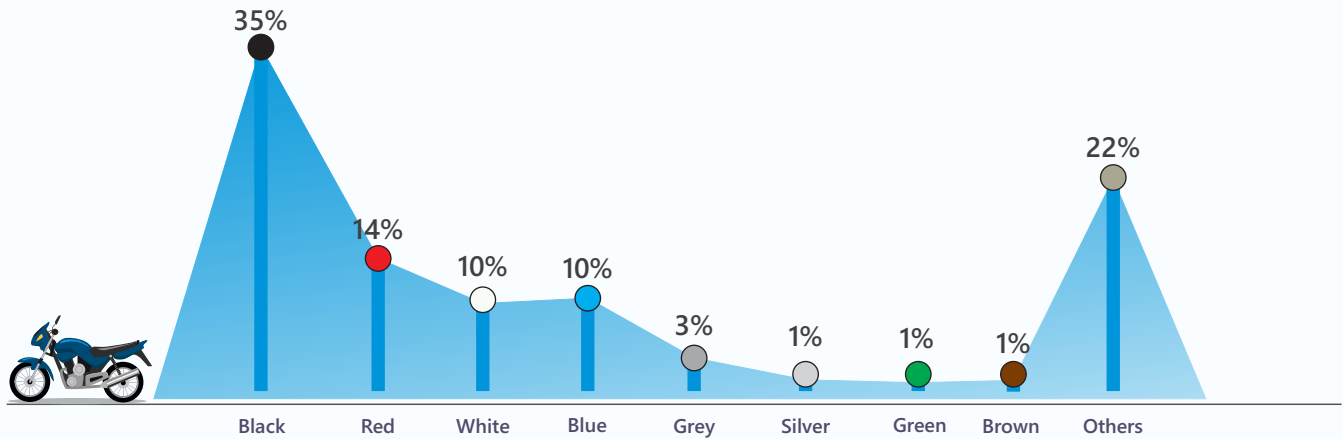
Cars by Year of Manufacture

Cars between 2010 to 2021 account for 98% of Sales

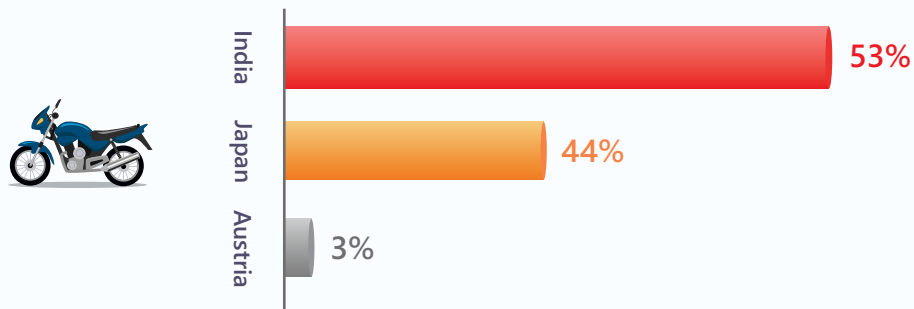


Note: This data is based on Droom's Internal Transaction data

2W by Colour

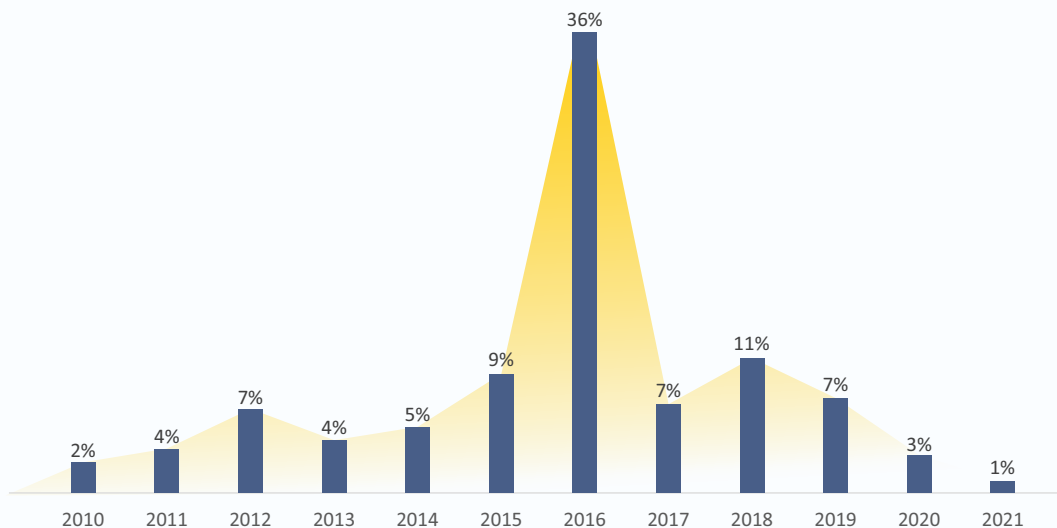


Bikes by OEM's Country of Origin



Bikes by Year of Manufacture

Bikes between 2010 to 2021 account for 96% of Sales



Note: This data is based on Droom's Internal Transaction data



DROOM BOOK

YELLOW

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.

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