



Winning India's consumer decade: The precision-led GTM blueprint for CXOs

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Executive view



India's consumer market has reached an inflexion point where growth requires greater precision. As demand fragments, channels converge and expectations surge, winning the next decade requires CXOs to redesign their go-to-market models for precision, speed and experience at a micro-market level.

Why this matters now

\$2.1 trillion in 2024

India's consumer market is at an inflexion point

India's private consumption reached ~USD2.1 trillion in 2024 from ~USD1 trillion in 2013ⁱ, reflecting increasing preference for speed, convenience and premium experiences.

Traditional GTM models are no longer fit for purpose

96 per cent of Indian e-shoppers research online before purchaseⁱⁱ, and **46 per cent** check inventory before visiting a store, making digitally enabled, insight-driven execution essential.

96 Research online

Channels are converging, power is shifting

India's rapid adoption of quick commerce and hybrid retail formats is compressing delivery timelines and redefining competitive advantage across categories.

Micro-markets drive growth

Winning brands design GTM strategies around micro-markets, including tailoring assortment, pricing, fulfilment and experiences to local realities.

The strategic urgency is real & rising

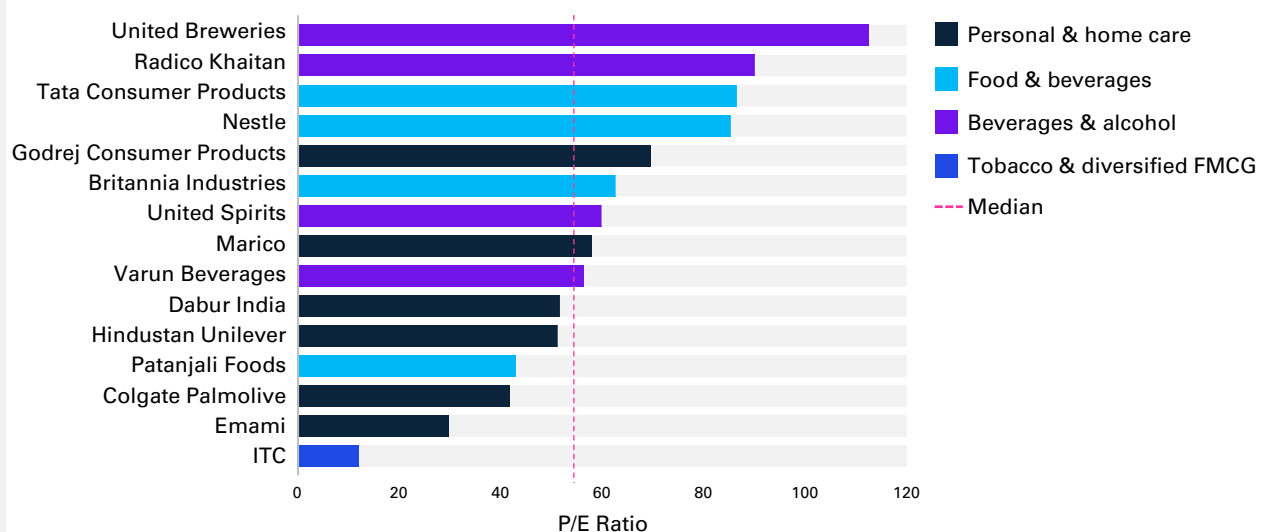
India's largest, most liquid and institutionally tracked FMCG companies are trading at structurally elevated valuations, with a **median P/E of ~58xⁱⁱⁱ**, i.e., **2x the global consumer staples benchmarks**.

At this valuation level, **even small GTM inefficiencies can quickly erode value**.

Brands need an operating model that converts high consumer demand into predictable, profitable growth through **micro-market precision, premiumisation and execution velocity**, i.e., Precision-led GTM.

Nifty FMCG Components P/E Multiples

(as of 09 Jan 2026, source: Dhan)



ⁱ How GST cuts and a young population are reviving India's economy, The week, December 2025

ⁱⁱ Achieving omnichannel retail success, Google Business, October 2024; Browse Online, Buy In-Store, IndianRetailer, January 2024

ⁱⁱⁱ NIFTY FMCG Stocks, dhan, Feb 2026

The inflexion point: How India's consumer market behaves



Nearly 80 per cent of Indian shoppers now discover new products via social media¹, far surpassing traditional in-store discovery. Five years ago, a consumer discovering a new brand in India typically encountered it on a single shelf, in a single channel, with a largely predictable path to purchase. Today, consumers discover a product on a social platform, compare prices on a marketplace, check availability on a quick commerce app and expect delivery within 30 minutes.

This shift reshapes how demand is created, influenced and fulfilled in India. For consumer businesses, growth opportunities are expanding rapidly, while the margin for GTM error is shrinking just as fast.

At the same time, an evolving data-protection environment is reshaping how brands collect and activate consumer data. With consent-led usage, minimisation norms and rising scrutiny, organisations must balance growth ambitions with responsible data stewardship to preserve trust and ensure compliance.

What this means for CXOs:

Winning in India demands building operating models that sense demand at a micro-market level, respond at digital speed and deliver consistent experiences across an increasingly fluid channel ecosystem.

The rest of this paper sets out that shift in detail, offering a structured and actionable view of how organisations transition from legacy, distribution-led approaches to a precision- and experience-led GTM architecture, fit for India's next decade.



What CXOs gain from this paper

A practical Precision-led GTM blueprint to redesign operating models, data foundations and execution engines for India's next decade of consumer growth.

¹ Nearly 80 of Indian shoppers discover new products via social media, Business Standard, February 2026



I. The new consumer logic: What's shaping demand



India's retail environment demands brands shift from broad-brush execution to precision-led engagement. This evolving consumer mindset

is driven by three powerful macro forces that CXOs must internalise and act on while designing the next-generation GTM model.

Macro force 1: Omnichannel behaviour as default

For consumers, the path from discovery to purchase has become non-linear, compressing multiple decisions into a single moment. A shopper might discover a product online, compare prices in-store and complete the transaction via quick commerce.

As journeys compress across touchpoints, trust becomes a conversion multiplier. Consumers carry context and expectations from app to store to doorstep, and reward consistent content, pricing, availability and fulfilment end-to-end.

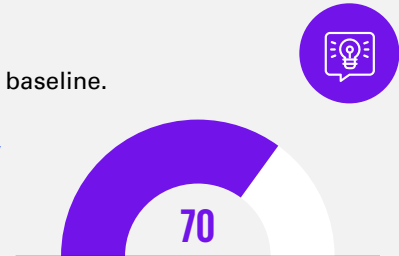
Insight:

Consumers no longer follow coherent journeys. Channel-hopping is the new baseline. Different channels shape perception differently.

>70 per cent of urban Indian consumers use more than one channel^{iv} before making a purchase decision.

Implication for CXOs:

Redesign GTM around phygital journeys with unified data, integrated inventory–pricing systems and seamless touchpoints enabled by a real-time Customer 360°.



^{iv} The Impact of Omni-channel Retailing on Consumer Purchasing Behaviour, Jagannath University Journal of Research and Review (JUJRR), July 2025

Macro force 2: Digital-first influence and rising CAC

Digital continues to shape discovery, but the nature of discovery has fundamentally changed. For many categories, especially apparel, beauty and lifestyle, popular marketplaces have become default discovery platforms, not just transaction engines. Consumers increasingly begin their journeys within these ecosystems, using search rankings, reviews, recommendations and influencer-led storefronts to evaluate brands.

At the same time, saturating ad platforms and intensifying competition have spiked customer acquisition costs (CAC) by 20–25 per cent² in the

last few years, and companies now allocate significant capital towards marketing and brand-building to sustain growth and visibility. An Indian online marketplace, for instance, has earmarked over INR1,020 crore from its IPO proceeds for marketing, brand campaigns and customer acquisition efforts across India, including performance and influencer-driven initiatives to expand its consumer base beyond metros. Mobile-led inspiration, powered by creator commerce, regional influencers and vernacular content, now coexists with declining efficiency of pure performance marketing.

² Digital CAC on the rise: How are D2C brands keeping up?, Exchange4Media, February 2024

This shift forces brands to rethink their digital operating models, moving from campaign-led acquisition to ecosystem-led presence, where visibility, availability and experience across dominant platforms are as critical as ad spend.

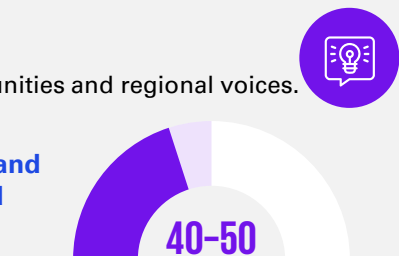
Insight:

Influence is being decentralised. Consumers increasingly trust micro-communities and regional voices. Converting influence into sales is more expensive than ever.

CAC now eats up 40–50 per cent^v of average order value, with Meta and Google CPMs rising sharply and influencer rates climbing as demand explodes.

Implication for CXOs:

Build a Digital Operating Platform that links digital intent to pricing, inventory and fulfilment in real time, maximising conversion while reducing media wastage and effective CAC.



^v The Impact of Omni-channel Retailing, JUJRR, July 2025

Macro force 3: Aspirational premiumisation

India's consumption growth is increasingly shaped by selective, aspiration-led trading up. While premium products have grown steadily

over the past decade³, the significance lies in where and how this growth is occurring.

³ With 7 CAGR in income over past decade, demand for premium product increasing in India: Report, The Economic Times, September 2025

Premium categories are expanding across income groups, and 'entry-premium' has become the new mass segment in many categories, often outperforming category averages.

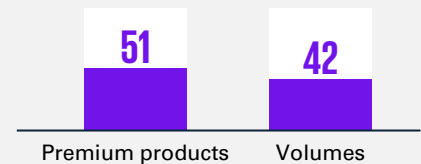
Insight:

Premiumisation has reached Tier II, Tier III and rural markets, powered by rising aspirations and greater exposure to global benchmarks.

Rural India is now emerging as a key driver of premium FMCG consumption. Affordable premium and super-premium products account for 51 per cent and 42 per cent^{vi} of volumes, respectively.

Implication for CXOs:

Redesign product portfolios for aspirational micro-markets, using data-led premium SKUs, AI-driven offers and journey-based KPIs to capture emerging value pools.



^{vi} FAST MOVING CONSUMER GOODS (FMCG), IBEF, August 2025

How brands are responding to India's new consumer logic

Shifts in GTM models across categories & channels

Omnichannel as Default

Brand Response:

- Customer Data Hub (CDH) enables true Customer 360 by unifying online-offline customer context
- Journeys stay continuous across channels
- Brands orchestrate experiences rather than channels.

Example:

Backed by ~30 per cent YoY growth in FY25, an Indian beauty and wellness brand is expanding from an online-first model to a full omnichannel footprint by:

- Doubling its physical store network to ~500 outlets across 100+ cities by FY30
- Positioning stores as discovery and experience hubs, integrated with digital platforms and rapid fulfilment.

Digital-first Influence + Rising CAC

Brand Response:

- Creator-led commerce and micro-influencer partnerships
- Shift from broad ads to precision cohorts
- In-house content studios + AI-driven targeting.

Example:

In **2025**, Indian D2C brands increasingly shifted to creator-led commerce^{vii} as digital CAC continued to rise. A recent industry report notes that:

- **~75 per cent** of Indian D2C brands now use creators to drive sales
- Micro and nano-influencers deliver 5–6x higher engagement than large influencers, making them more cost-effective for acquisition.

Moving away from paid ads toward precision cohorts, in-house content teams and AI-led targeting enables brands to scale content, improve Return on Ad Spend (ROAS) and lower CAC.

^{vii} 3 in 4 D2C brands in India now rely on creators to boost growth, buzzincontent, December 2025

Aspirational Premiumisation

Brand Response:

- Clear 'step-up' price tiers that enable affordable premiumisation
- Smaller or smart pack formats to lower trial barriers
- Premium propositions beyond MT into high-velocity GT clusters
- Premium cues on efficacy, ingredients and experience
- Data-driven identification of micro-markets where premium adoption scales fastest.

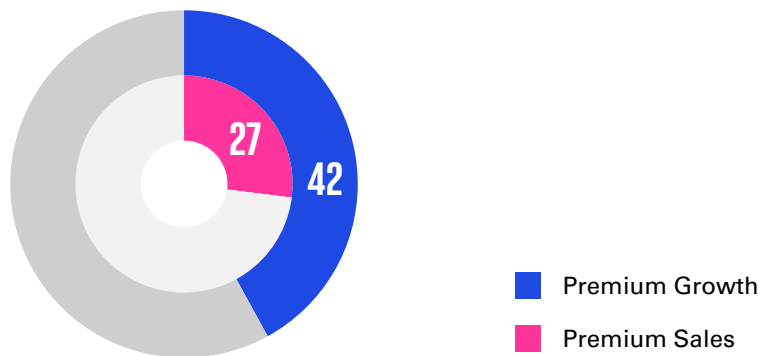
Example:

A leading Indian FMCG player recently introduced a premium liquid detergent variant priced at INR99^{viii} to encourage mass consumers to trade up from traditional powders. The strategy focused on

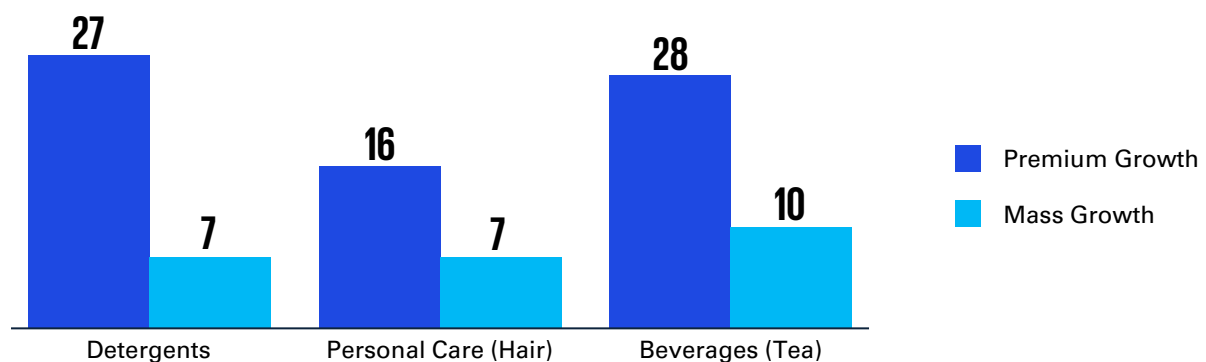
- Entry-premium pricing
- Smaller pack sizes and
- Wide availability across general trade.

Premium FMCG now accounts for ~15 per cent of total volumes in India, enabling aspirational consumers to upgrade within budget.^{ix}

Premium FMCG: Share of Sales vs Share of Growth



Premium FMCG is Driving Disproportionate Growth Across Categories



The strong overall+ category-wise growth signifies that premiumisation is the primary engine of category growth. Brands that fail to build accessible step-up tiers risk missing where demand is moving.

^{viii} Premium FMCG consumption expands beyond urban centres: Worldpanel India, Best Media Info, September 2025

^{ix} Indian consumers snap up new FMCG categories as companies expand reach, livemint, August 2025

What the new consumer logic means for CXOs:

Demand in India is now asymmetric, premium-led and hyper-fragmented. Consumers want speed, relevance and personalisation. They expect brands to deliver consistently across touchpoints.

II. The channel shift: Convergence, competition and new power centres



Alongside shifting consumer behaviour, a structural convergence is redefining India's retail environment. The five dominant channels, General Trade (GT), Modern Trade (MT), E-

commerce, Quick Commerce (Q-commerce) and Direct-to-Consumer (D2C), now overlap, reinforce and often compete across the consumer journey.

The channel chessboard: How power is rebalancing

1. General trade (GT): The rapidly digitising backbone

General Trade remains the backbone of India's retail system, with 14 million kirana stores⁴ anchoring everyday consumption. However, GT is evolving rapidly within the broader GTM ecosystem.

- Adoption of UPI, e-POS, distributor apps and loyalty platforms digitises ordering and payments
- Distributor-led platforms and B2B marketplaces shorten delivery cycles and enable precision replenishment
- Same-day or next-day fulfilment is increasingly expected in dense clusters
- Digitisation increases expectations around assortment relevance and service levels.

What this means: GT increasingly integrates into a unified GTM engine as an integrated, data-visible node.

2. Modern Trade (MT): Becoming hybrid (store + app) and experience-first

Modern Trade blends physical discovery with digital convenience.

- Store apps, click-and-collect and home delivery blur physical-digital journeys
- Experiential formats such as discovery aisles, demo zones and brand events reshape engagement
- MT acts as a premiumisation engine in affluent clusters
- Digital extensions influence assortment and promotions.

What this means: MT must be managed as a hybrid channel where experience and digital integration drive growth.

3. E-commerce: Algorithmic competition that reshapes assortment

E-commerce remains a scale channel governed by algorithms.

- Performance hinges on content accuracy, reviews, availability, pricing and retail media
- Algorithms favour high-conversion SKUs, pushing optimisation of packs, images, claims and delivery speed
- Brands optimise titles, descriptions and metadata to improve algorithmic ranking⁵
- Success requires coordination across marketing, supply chain and catalogue governance.

What this means: E-commerce demands continuous optimisation across search, assortment and retail media.

4. Q-commerce: Speed that resets consumer expectations

Q-commerce has evolved into an algorithm-driven channel where speed, availability and visibility are decisive.

- Discovery is driven by algorithmic shelves prioritising availability and fulfilment speed
- Brands run A/B tests on packs and pricing to improve visibility
- Dynamic substitution features, such as 'swap and save', introduced by leading quick commerce platforms, redirect demand based on availability and pricing signals
- Companies now plan two to three weeks of forward inventory for priority clusters and replenish faster than traditional cycles
- This requires accelerated planning, tighter SLAs, new KPIs and sharper focus on unit economics.

What this means: Q-commerce demands a synchronised approach to supply chain, algorithms and profitability.

⁴ Achieving seamless commerce in India, KPMG, February 2024

⁵ Amazon, Flipkart tune product listings to rise in ChatGPT, AI searches, Business Standard, February 2026



5. D2C: The experimentation lab for new propositions

D2C has emerged as a critical innovation layer within precision-led GTM.

- In personal care categories, D2C brands compete on efficacy, transparency and personalisation
- Products such as sulphate-free shampoos, science-backed serums and functional innerwear are shaped through direct feedback and rapid iteration
- A leading skincare brand leverages zero-party

data and community feedback to launch ingredient-led hair and skincare lines that directly respond to consumer needs and preferences

- For incumbents, D2C is a high-feedback environment to test formulations, pricing and micro-segment propositions
- Performance marketing, zero-party data and owned communities enable faster validation cycles.

What this means: D2C's primary value is rapid learning, even when scale varies by category.

What the channel shift means for CXOs:

Channel strategy is now a multi-node system that demands a shift from 'distribute and push' to precision-led orchestration. The following four imperatives define Precision-led GTM:

1. Micro-market differentiation

As channels converge, demand behaviour increasingly diverges at a micro-market level. Micro-market strategy must address both demand creation and fulfilment execution.

- Designing GTM for an 'average consumer' within a locality is structurally flawed, as micro-markets are inherently fragmented. Even affluent pin codes contain sharply contrasting segments. High-income households exist alongside different price sensitivities, pack preferences and shopping access
- This reshapes fulfilment dynamics. As nearby kiranas close, quick commerce serves both premium and non-premium demand within the same pin code. Brands must mirror this approach by serving multiple demand segments locally.

Focused wins in selected micro-markets deliver disproportionate growth with lower complexity. Consistent micro-market differentiation enhances relevance while keeping the overall GTM architecture coherent.

2. Dynamic pricing across channels and micro-markets

With pricing now spread across channels, the goal is coherent, channel-led and micro-market-responsive pricing. Different channels deliver different value propositions, and pricing reflects that reality.

- Establish real-time price intelligence. Brands must have live visibility across platforms to understand how value is differently expressed. A marketplace cashback, a Q-commerce convenience premium and an MT bundle should not be evaluated equally
- Unify promotional governance. A single decision framework defines where brands compete on assortment and incentives (e-commerce), where speed can command a premium (Q-commerce) and where experience and discovery justify value (MT/GT)
- Price by channel first, then micro-market. Channel-specific price logic must flex further by micro-market based on income mix, demand intensity and local competition.

The objective is pricing coherence by enabling differentiated value across channels while protecting trust, margins and long-term brand equity.

3. Execution and speed as a differentiator

Delivery SLAs now shape brand perception. Consumer expectations shaped by Q-commerce influence how speed is judged across channels.

- Recognising channel-specific speed benchmarks is non-negotiable. Brands must align supply chain design and inventory positioning to these expectations.
- Micro-fulfilment hubs, forward inventory placement and channel synchronisation reduce response time and lost sales
- KPIs must measure service levels, fill rates and response times alongside traditional cost metrics. Faster fulfilment without reliability quickly erodes trust.

When executed well, speed signals reliability, freshness and responsiveness across the consumer journey, becoming a competitive advantage.

The digital shelf is a core GTM lever shaped by algorithmic visibility.

- Brands must manage assortment complexity at scale. Maintaining a very large SKU portfolio across platforms can enhance discoverability, provided they can manage focus and operations. Reducing SKUs can improve efficiency, but at the cost of visibility
- Intelligent digital assortment must be optimised to prioritise SKUs based on platform algorithms, search behaviour, margins and fulfilment feasibility. AI-led SKU ranking and platform-specific assortment strategies help balance breadth with performance
- Content accuracy and availability parity are critical to rankings, conversion, and managing regulatory and reputational risk
- Digital shelf mastery improves platform-led demand generation and product visibility, with aligned product availability complementing these efforts to deliver investment outcomes.

4. Digital shelf mastery

CXO sidebar:

The four new rules of winning across channels

Orchestrate, don't optimise in silos

Omnichannel shoppers deliver **~30 per cent** higher spend and repeat rates^x. GTM success depends on unified KPIs that align internal teams to drive the omnichannel journey.

Manage pricing dynamically

Pricing must flex by channel and micro-market, aligned to value propositions while maintaining clear guardrails.

Treat speed as a differentiator

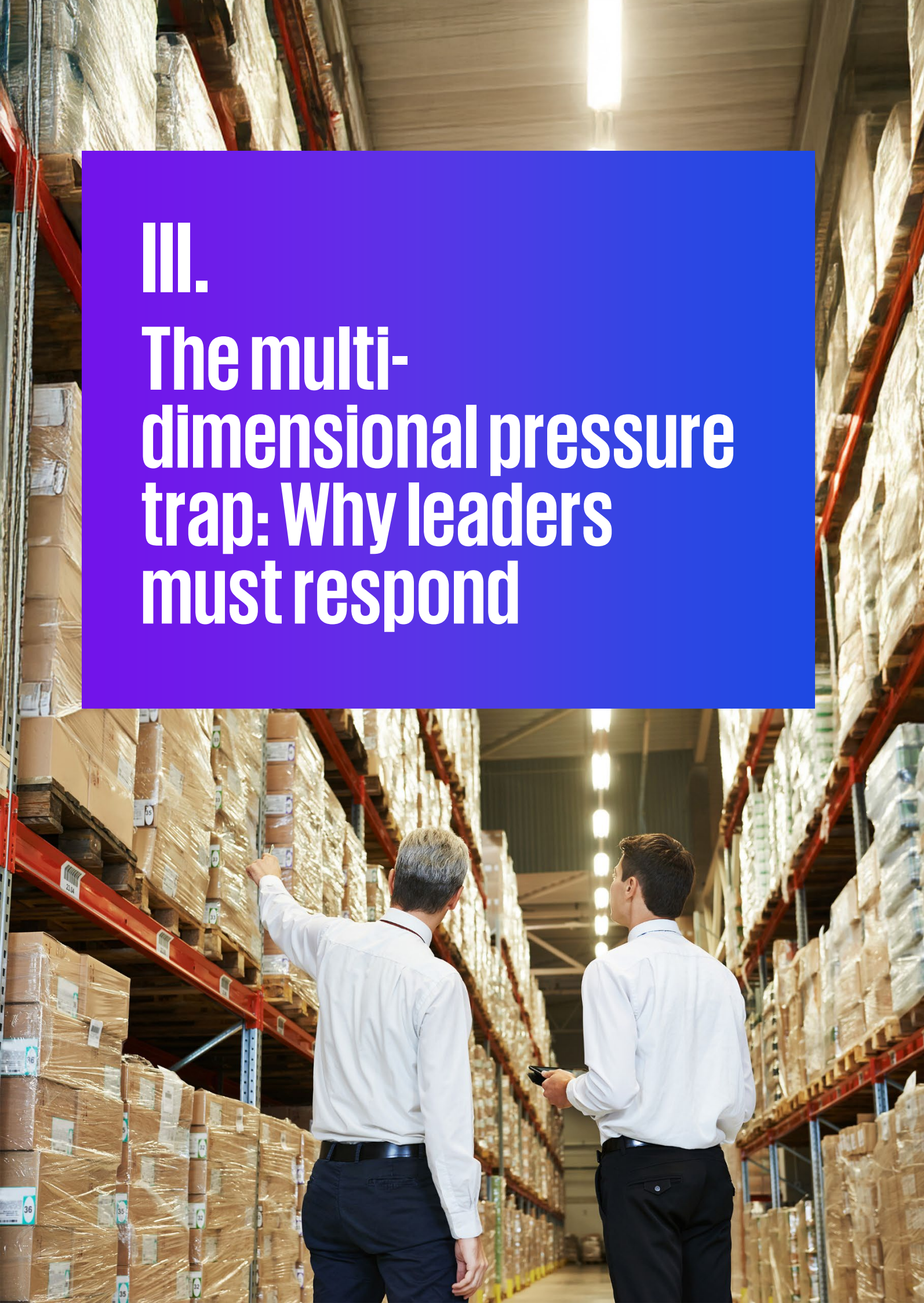
63 per cent of Indian online shoppers expect delivery within three days.^{xi} Faster fulfilment directly expands reach, enables trials and reduces drop-offs.

Master both physical & digital

Unified, real-time inventory and shelf visibility support faster replenishment, fewer lost sales and a seamless omnichannel experience.

^x The Impact of Omni-channel Retailing on Consumer Purchasing Behaviour, Jagannath University Journal of Research and Review (JUJRR), July 2025

^{xi} Consumer Study: 63 Of Online Shoppers Expect Three-Day Delivery As Standard, retail touchpoints, April 2018

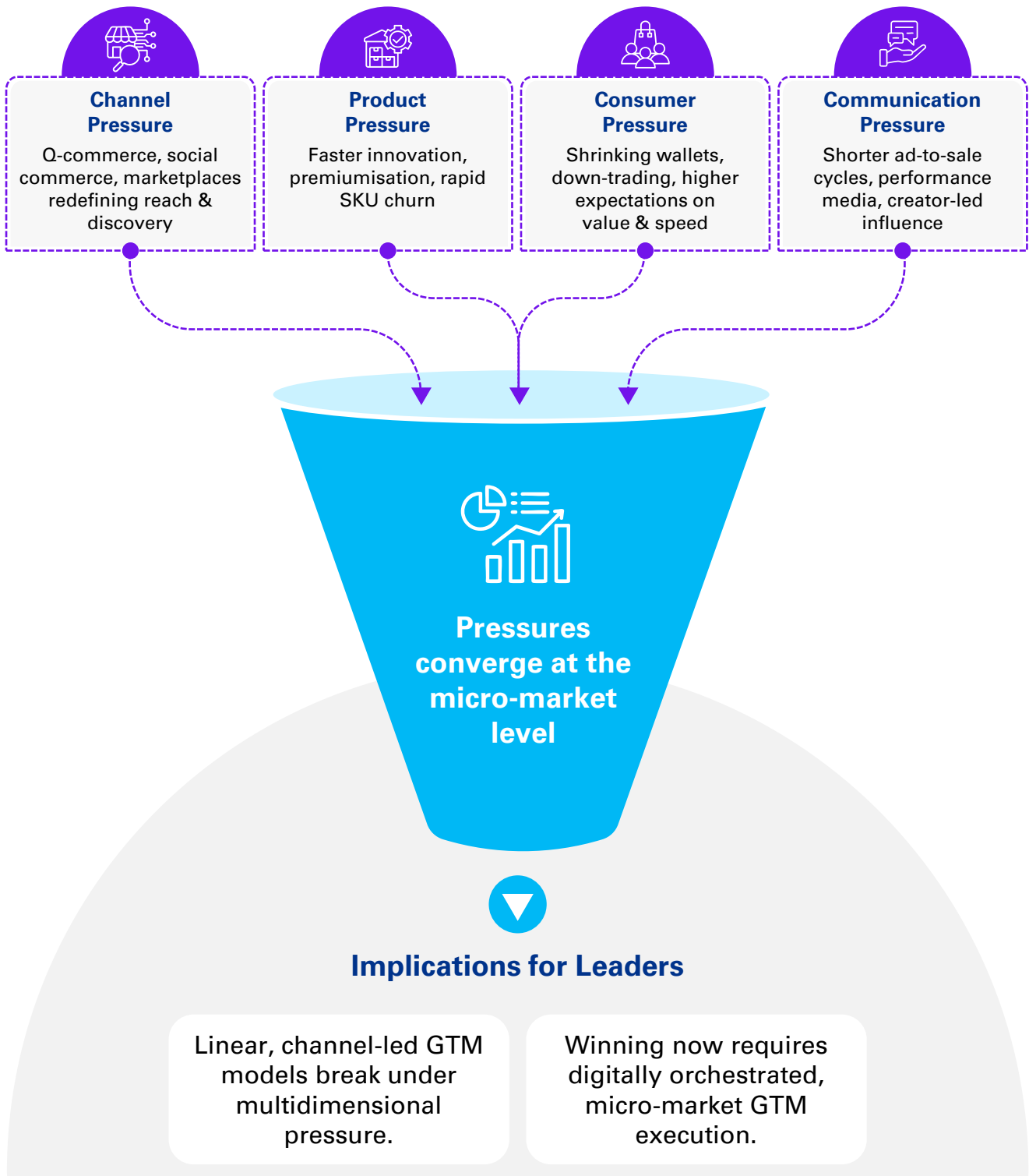
The background of the slide is a photograph of a large warehouse. High industrial shelving units are filled with numerous cardboard boxes, some wrapped in clear plastic. The perspective is looking down a long aisle between the aisles of shelving. A bright light fixture is visible on the ceiling. A large, solid blue rectangle is overlaid on the upper half of the image, containing white text.

III. The multi- dimensional pressure trap: Why leaders must respond



India's consumer market is experiencing simultaneous structural shifts that compress growth, margins and relevance.

The multi-dimensional pressure trap



On the premium end, digitally native brands continue to expand their footprint. India's D2C market was projected to scale to ~USD 100 billion by 2025⁶, expanding the competitive field in categories once considered stable.

At the other end, inflation-led price hikes and tighter middle-class wallets are driving down-trading, increasing the share of fragmented, informal competition in several segments even as organised players invest heavily in modern channels.

Overlaying this is pressure from new channels

and formats. quick commerce now accounts for ~30 per cent of India's online FMCG sales⁷, with the segment growing ~70–80 per cent YoY, shifting power toward control, visibility, speed and availability. Social and creator-led commerce further fragments attention and influence

The cumulative impact is structural. Decision complexity is now concentrated at the micro-market level, where pricing, assortment, visibility and fulfilment choices determine both growth and profitability. Incremental adjustments are thus insufficient. Leaders must redesign GTM to operate digitally at micro-market resolution.

⁶ E-commerce industry in India, IBEF, November 2025

⁷ Quick commerce captures nearly half of Kirana Sales, ET Retail, November 2024

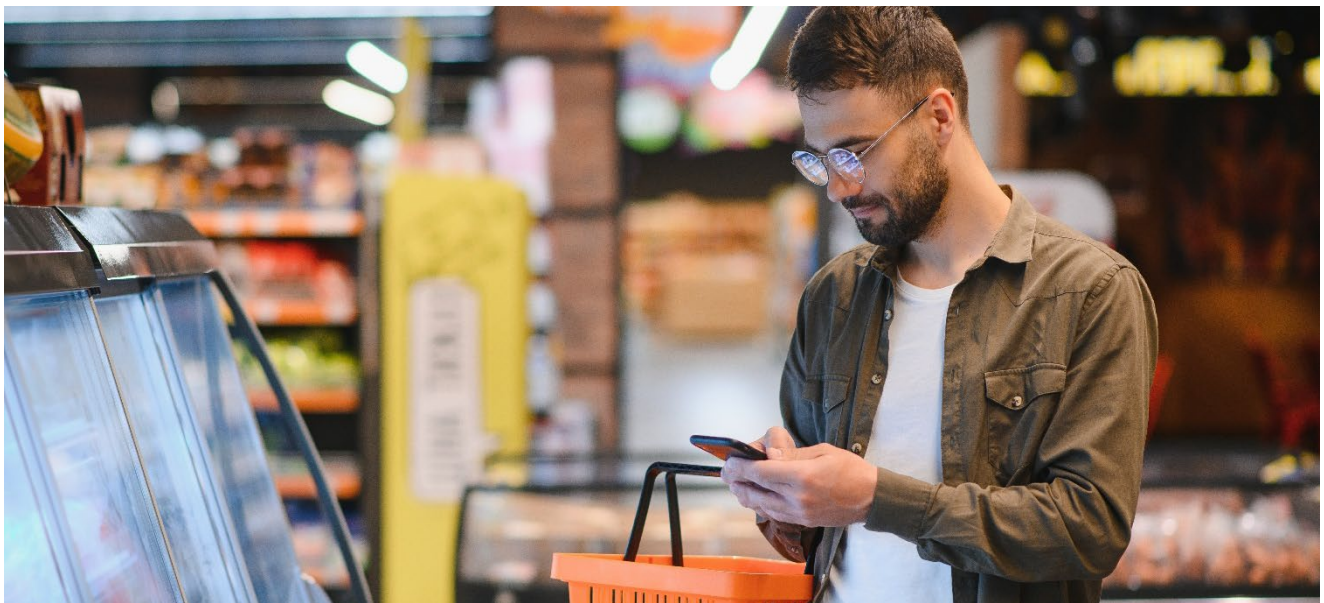
Mini case-study

Accelerating Premiumisation Through Acquisition

An FMCG major was able to connect with young, premium-seeking, digitally native buyers by acquiring a 90.5 per cent stake in a fast-growing D2C brand in 2025. The diversification into efficacy-driven beauty accelerated premiumisation and strengthened the brand's relevance in a market where transparency, personalisation and fast innovation are paramount. This showcased how incumbents must rethink portfolio strategy to remain competitive.

What this means for CXOs

The multi-dimensional pressure trap has no tactical exit. Precision-led GTM is the only defensible response that rewires how brands sense demand, innovate portfolios and execute at speed across channels.



IV.

Precision-led GTM: The new leadership blueprint



Precision-led GTM is a leadership-level reset. Organisations must re-architect how they process demand, decisions and execution as consumer demand fragments, channels converge and execution timelines compress. The shift strengthens precision-driven models alongside traditional distribution. **Precision-led GTM depends on assortment, fulfilment, execution, data, talent and sustainability operating as one coherent system.**

The below figure outlines the core differences between traditional and a precision-led GTM models:

Difference between GTM 1.0 and Precision-led GTM across parameters:

	GTM 1.0	Precision-led GTM
Core Philosophy	• Reach-led expansion • One-size-fits-all playbooks	• Relevance-led growth • Micro-market precision & experience-first design
Consumer View	• Linear funnel (awareness > purchase) • Channel-specific behaviour assumptions	• Non-linear, phygital journeys • Channel-hopping, intent-driven behaviour
Market Structure	• India treated as a uniform market • National averages drive decisions	• India as a mosaic of clusters • Pin-code, platform & cohort-level strategies
Channel Strategy	• Channels planned & managed in silos • Minimal coordination across GT, MT & digital	• Converged channel ecosystem • GT, MT, e-commerce, Q-commerce & D2C work as one engine
Assortment & Pricing	• Limited SKU differentiation • Uniform pricing & packs across channels	• Channel-specific price-pack architecture • Entry-premium formats & platform-led packs
Speed & Fulfilment	• Static replenishment cycles • Speed as an operations metric	• Speed as a brand promise • Micro-fulfilment, accelerated planning, SLA-led execution
Data & Technology Use	• Fragmented systems & lagging data • Reporting-driven decision-making	• Unified Digital Operating Platform (DOP) • Predictive, prescriptive & AI-enabled execution
Organisation & Incentives	• Channel-wise targets & silos • Manual, experience-led execution	• Cross-functional pods • Shared KPIs & AI-augmented field force
Sustainability & Governance	• Compliance-driven sustainability • ESG managed separately from GTM	• Sustainability embedded into GTM design • ESG, data protection & AI governance by design
Takeaway	• How to expand distribution?	• How do we sense demand early, act locally and scale responsibly?

For leaders, the blueprint towards precision-led GTM includes six fundamental capabilities.

1. Precision assortment & price-pack architecture

Precision assortment and price-pack architecture are central to Precision-led GTM, as a single national SKU strategy no longer delivers optimal outcomes. Winning brands design portfolios and price-pack logic around how channels create value and then refine them further at a micro-market level.

Channel roles shape price-pack logic. General Trade favours value-led, fast-moving packs at accessible price points. Modern Trade enables premiumisation through larger formats, bundles and discovery-led SKUs. E-commerce rewards breadth and algorithm-friendly assortments, while Q-commerce prioritises top sellers, convenience packs and instant-need formats. D2C functions as

a testing ground for premium, limited-edition or ingredient-led propositions before scale-up.

Across categories, entry-premium formats are bridging mass volumes and margin expansion through improved formulations, packaging and claims without sharp price jumps. Platform-specific packs, channel exclusives and curated bundles help maintain relevance while limiting direct price comparison.

Also, regulatory and sustainability considerations increasingly influence pack design. Extended Producer Responsibility (EPR) norms, recyclability and material efficiency must be embedded early to stay compliant at scale.

Illustrative case:

FMCG companies are increasingly institutionalising Price-pack architecture as a core revenue growth lever, systematically aligning pack sizes, price points and formats to consumer segments and channels to improve penetration, strengthen mix and enhance margin quality.

What improves	Higher SKU productivity, reduced price leakage and stronger margin discipline as portfolios align to channel roles and micro-market demand rather than national averages.
How to measure	• Per cent lift in top-SKU sell-through • Product- and channel-level profitability • CAC improvement driven by better price-value fit
What this means for CXOs	Assortment decisions now drive growth. Price-pack architecture must be channel-specific, data-led and continuously refined.

2. Fulfilment agility & speed as a brand lever

Delivery speed has become a decisive brand differentiator. With quick commerce now accounting for over 70-75 per cent⁸ of India's online grocery orders, the expectation of '30 minutes or less' is influencing even MT and e-commerce.

High-frequency categories such as groceries, beverages, snacks, personal care and household essentials benefit most from immediacy, where speed directly drives choice and repeat purchase. Indulgence-led products, beauty and select electronics are also seeing impulse-led buy as 'need-now' moments convert instantly.

To compete, brands must build multi-node fulfilment models: micro-fulfilment hubs, synchronised GT-MT-Q-commerce inventory,

EV-enabled last-mile fleets, fuel-optimised routing and end-to-end traceability.

Beyond fulfilment, Q-commerce has become a strategic GTM channel for rapid entry, hyperlocal launches and live experimentation with SKUs, packs and pricing. Presence increasingly signals brand relevance and accessibility, especially among urban Gen Z and millennials.

Meeting promised SLAs is critical to building brand preference. Same-day or 30-minute delivery windows in priority clusters reduce drop-offs, induce trials and reinforce loyalty over time. For brands, the most critical takeaway remains this: **speed creates advantage only when it is consistently honoured.**

Illustrative case:

A leading Indian omnichannel eyewear brand enabled same-day and next-day delivery for prescription products in major metros by deploying city-level micro-manufacturing hubs, real-time inventory sync across stores and digital channels and hyperlocal last-mile delivery. In a high-consideration category, fulfilment speed became a trust and conversion lever, reshaping customer expectations and strengthening brand equity.

What improves	Lower lost sales and more trial and repeat, leading to improved brand preference as faster fulfilment expands reach and converts 'need-now' moments
How to measure	• Fill-rate • SLA adherence by channel and micro-market • Repeat purchase and reorder frequency
What this means for CXOs	Build speed into the brand instead of the supply chain. Fulfilment agility is a core driver of growth within the GTM engine.

3. Retail execution 2.0 (Physical + digital shelves)

Retail execution in India is now inherently phygital. Brands must win simultaneously on the physical shelf: visibility, availability, experience, and the digital shelf: search rank, content accuracy, reviews and algorithms.

Automotive retail illustrates this shift. Purchase journeys are digitally initiated through configurators, virtual showrooms and online bookings, then completed offline via test drives and fulfilment. Advantage requires tight synchronisation between online promise and offline delivery.

Beauty brands follow a similar model. Digital shelves drive performance through share-of-search, ratings and rich storytelling, while stores

mirror this with virtual try-ons, QR-led discovery and assisted selling, guided by online demand signals.

To enable this, AI-led audits drive real-time compliance, digital shelf optimisation improves platform visibility, retail media ROI frameworks guide spend effectiveness and robust claims governance helps in regulatory and platform alignment.

In this environment, execution quality directly shapes brand trust. Accurate claims, consistent content, strong ratings and reliable availability go well beyond hygiene factors and meaningfully influence conversion.

Retail Execution



Synchronised physical + digital shelves: Consistent availability, content & experience



AI-led audits & signals: Improved real-time execution compliance across stores & platforms



Digital shelf & retail media optimisation: Higher share-of-search, conversion & ROI



Claims accuracy & data hygiene: Steady platform rankings, regulatory compliance & brand trust

What improves	Stronger discoverability, availability, and conversion across formats, leads to better alignment between online promise and offline delivery.
How to measure	• Digital share-of-search • On-shelf availability (OSA)
What this means for CXOs	Execution discipline spans both physical and algorithmic shelves. Treat digital and physical retail as a unified execution system.

4. The DOP

The Digital Operating Platform (DOP) is the operating backbone of Precision-led GTM. As channels converge and behaviour shifts in real time, fragmented systems can slow decisions and dilute execution. The DOP enables leaders to sense demand early and act decisively through one coordinated GTM engine.

At a business level, it moves GTM from reactive to predictive by connecting demand signals,

inventory visibility, pricing actions and engagement data to anticipate shifts, refine assortments, guide promotions and synchronise fulfilment at a micro-market level.

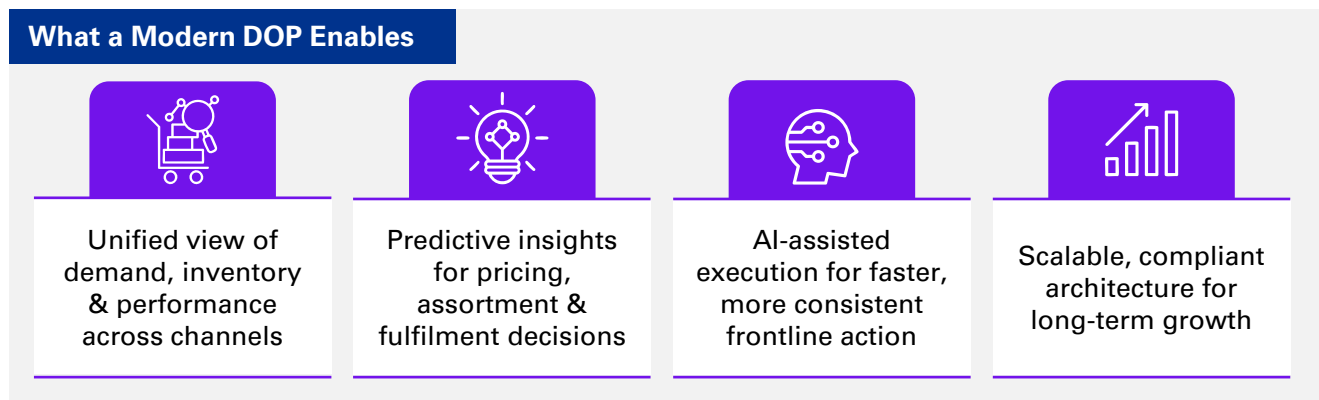
AI-led recommendations and copilots support sales, marketing and supply teams with clear next-best actions, improving speed, consistency and ROI while reducing manual effort.

Generative AI has dramatically lowered the cost and complexity of deploying advanced data models for assortment planning, inventory optimisation, and field-force enablement.

- Karan Sood, Partner, Digital Cloud Solutions, KPMG in India

A cloud-first approach supports scalability and cost efficiency, while governance remains critical. Data privacy, ethical AI use, localisation and

regulatory compliance must be embedded by design to protect trust and future-proof growth.



What improves	Faster, more confident decision-making as GTM shifts from reactive firefighting to predictive, coordinated execution across channels.
How to measure	• Decision cycle time • Forecast accuracy at the micro-market level • Adoption and usage of AI-led recommendations
What this means for CXOs	DOP functions as a strategic control tower for growth. Leaders who treat it as a business engine can execute GTM with greater precision, speed and confidence.

5. Talent, incentives & execution culture

Talent and culture form the execution layer of Precision-led GTM. As operating models digitise, success demands cross-functional, data-enabled

teams that can respond to micro-market signals at speed.

"Agility starts with talent that's cross-functional and feedback-driven."

- Sharad Maloo, Partner, HCAS Transformation, KPMG in India.

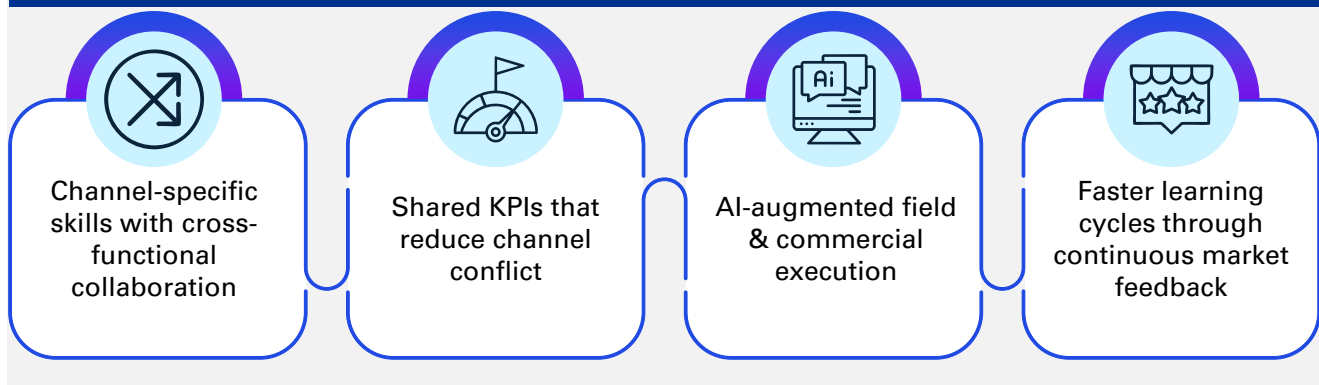
Channel-specific capabilities are essential. GT field teams must combine relationship skills with digital fluency. MT teams increasingly operate as commercial analysts, co-planning assortments and promotions using store-level data. D2C and e-commerce squads require expertise in algorithms, funnels and conversion optimisation. Distinct skills are needed, but with a shared execution mindset.

Incentive redesign is equally critical. Channel-wise

targets often create friction. Leading organisations must shift to shared demand or micro-market growth metrics, rewarding teams collectively for market share, service levels and experience regardless of where the sale occurs.

With DOP embedded into daily workflows, human decision-making is amplified through AI-led insights and real-time feedback, raising execution consistency while reducing manual effort.

What a Precision-led GTM Talent Model Enables



What improves	Reduced channel conflict, faster cross-functional action and higher execution consistency as teams rally around shared outcomes.
How to measure	• Channel-conflict incidents • Time-to-market for launches and changes • Employee productivity and adoption metrics
What this means for CXOs	Execution excellence is a leadership mandate. Invest in people, redesign incentives and embed intelligence into workflows to turn Precision-led GTM strategy into a sustained market advantage.

6. Sustainability as growth

In Precision-led GTM, sustainability plays a growing role as both a compliance requirement and a growth lever. As consumers increasingly reward sustainable choices and regulations tighten, embedding sustainability into GTM design strengthens both demand and resilience.

Sustainable GTM begins with fulfilment and packaging. EV-led last-mile delivery, route optimisation and carbon-aware distribution reduce costs and emissions. India already has one of the world's fastest-growing EV-based delivery fleets, with leading e-commerce, quick commerce and food-delivery platforms deploying thousands of electric two- and three-wheelers across Tier 1 and Tier 2 cities. For example, a leading Indian e-commerce platform has deployed 10,000+ EVs and is targeting large-scale electrification of its last-mile fleet, aiming to fully electrify its delivery fleet by 2030.

Packaging innovations such as lighter materials, recyclability, refill formats and reduced plastics support EPR compliance while improving unit economics and shelf appeal. With India's EPR regulations now mandating defined plastic waste recovery targets, FMCG companies are redesigning packaging to reduce material intensity, improve recyclability and lower reverse-logistics costs, directly impacting distributor viability and cost-to-serve.

Beyond packaging, clean-label product design is emerging as a powerful sustainability-led GTM lever. Indian FMCG brands are increasingly simplifying ingredient lists, removing artificial additives, and emphasising transparency and traceability. Clean-label propositions resonate strongly with urban, health-conscious consumers and improve shelf conversion in modern trade and discovery-led quick-commerce journeys.

Quick commerce must evolve from convenience to consciousness – platforms must nudge consumers toward greener choices and invest in eco-friendly delivery and packaging.”

- Namrata Rana, Partner and National Head of ESG at KPMG in India

To scale impact, brands must integrate sustainability into GTM scorecards. Metrics such as carbon intensity per order, recyclability, EV

penetration and waste reduction should sit alongside traditional performance KPIs, enabled by real-time measurement platforms.

Illustrative case

A leading Indian beverage brand leveraged eco-friendly, recyclable packaging combined with nostalgic branding to stand out in a crowded market. This sustainability-focused approach resonated with environmentally conscious consumers, strengthened brand loyalty and enhanced shelf visibility. It helped the brand expand distribution in urban and modern trade channels, attract premium investors and connect with younger consumers, turning sustainability into a growth and brand advantage.

What improves

Lower unit costs, stronger brand preference and higher resilience as sustainability choices reinforce both economics and consumer trust.

How to measure

- Packaging weight reduction and recyclability
- EV penetration in fulfilment
- Net Promoter Score (NPS) and brand trust indicators

What this means for CXOs

Embed sustainability into the GTM stack. It strengthens brand equity, lowers long-term cost and meets rising regulatory and consumer expectations.

A close-up, vertical photograph of a woman's profile and shoulder. She is wearing a light beige or tan coat and a vibrant red scarf. The background is softly blurred, showing hints of an indoor setting with warm lighting. A large, solid blue rectangle is overlaid on the left side of the image, containing white text.

V.

**The CEO agenda:
What to do in the
next 6-24 months**

As India's consumer landscape accelerates, execution determines who wins the next decade. Precision-led GTM requires a structured, sequenced transformation to prioritise the moves that can deliver meaningful impact, quickly and effectively. This roadmap provides CXOs with a clear set of decisions and actions for now, in the

medium term and over the long term.

To simplify this transformation journey, the roadmap can be viewed in three structured phases: Foundation, Orchestration and Leadership. The following snapshot outlines the strategic intent of the phases.

A 3-phase roadmap

Foundation (0-6 Months)

Build micro-market visibility across channels, products and customers; align execution basics; pilot DOP-lite to manage decision complexity.

Phase 1

Orchestration (6-24 Months)

Orchestrate demand and fulfilment at micro-market level by integrating data, incentives and customer context without scaling sales forces.

Phase 2

Leadership (24+ Months)

Scale AI-led, digitally executed micro-market GTM through a full DOP, embedding governance and sustainable competitive advantage.

Phase 3



Precision-led GTM: The CEO Roadmap

Foundation: 00-06 months

Zoom into micro-markets and eliminate blind spots

01 Establish omnichannel & micro-market visibility

- Run a 360-degree diagnostic across channels x micro-markets x products x customers.
- Map {pricing, assortment, availability and SLAs} x {city, cluster and pin-code} x {GT, MT and Q-commerce}.
- Identify both demand non-fulfilment and fulfilment without a clear demand.

What it achieves

- A single, leadership-level view of where growth leaks at micro-market level
- Early identification of execution gaps masked by national averages.

KPIs/Success metrics

- Channel x micro-market price dispersion
- Availability gaps by cluster
- Digital shelf accuracy by priority micro-markets.

02 Prioritise micro-markets to win (not pan-India by default)

- Shift to micro-market prioritisation, since not all brands can win everywhere
- Identify micro-markets for premiumisation, speed-led categories and experimentation based on demand density and channel mix
- Define clear where-to-play choices instead of a thin national spread.

What it achieves

- Focused investment; brands win decisively
- Faster proof of GTM effectiveness.

KPIs/Success metrics

- Growth contribution from the top 20 per cent micro-markets
- Sell-through variance by cluster
- Assortment productivity by micro-market.

03 Launch DOP-lite to manage decision complexity

- All micro-markets cannot be executed manually or with linear sales structures
- Leverage data from sales, inventory, pricing and digital channels for digital decisioning
- Establish common metrics, governance and alerts at micro-market level.

What DOP-lite covers

- Unified visibility across channels x micro-markets x products
- Basic alerts on availability gaps, price deviations and demand spikes
- Common definitions and metrics across leadership and teams.

What it achieves

- Faster decisions, fewer debates
- One version of the truth across functions.

KPIs/ Success metrics

- Decision cycle time
- Short-term forecast accuracy
- Manual reporting effort reduction.

Orchestration: 06-18 months

Translate micro-market insights into coordinated demand-gen and fulfilment

01 Move from omnichannel presence to micro-market experience

- Enable customer context to move across channels with priority micro-markets.
- Deploy CDH/Customer 360 to support demand creation and fulfilment stay synchronised locally.

What it achieves

- Higher conversion, lower drop-offs, improved repeat behaviour.

KPIs/Success metrics

- Cross-channel conversion rates
- Repeat purchase frequency
- Customer lifetime value (CLV)
- Drop-off reduction across journeys.

02 Re-architect assortment, pricing and inventory by channel role & micro-market

- Define clear channel roles (value, discovery, speed, experimentation) for each micro-market
- Align price-pack architecture and inventory placement to local demand and buying power.

What it achieves

- Margin discipline with local relevance
- Reduced channel conflict.

KPIs/Success metrics

- Margin by channel
- Inventory turns
- Channel conflict incidents
- Platform-specific SKU productivity.

03 Scale DOP from visibility to decisioning

- Introduce predictive insights for micro-market demand gen, replenishment and promotions
- Embed AI-led recommendations into sales, marketing and supply workflows.

What it achieves

- Faster response to local demand shifts
- More consistent outcomes without scaling the sales force linearly.

KPIs/Success metrics

- Mid-term forecast accuracy
- Promotion ROI
- Service level adherence
- AI recommendation adoption rate.

Leadership: 18-24+ months

Institutionalise micro-market execution as a defensible capability

01 Implement a full-scale Digital Operating Platform (DOP)

- Integrate demand, supply, pricing, retail media and CX data at micro-market level
- Use advanced AI for scenario planning and next-best actions
- Ensure built-in governance, compliance and ethical AI controls.

What it achieves

- Ability to digitally manage micro-markets at scale
- Firmly systemic GTM excellence
- Regulatory-ready, future-proof GTM execution

KPIs/Success metrics

- End-to-end GTM ROI
- Micro-market growth rates
- Decision-to-execution lead time
- Compliance and data governance scores

02 Redesign incentives & operating culture

- Shift to shared demand and experience KPIs.
- Reward teams for outcomes, not channel silos.

What it achieves

- Collaboration consistently replaces competition
- Faster learning and execution

KPIs/Success metrics

- Cross-functional KPI attainment
- Time to market for new launches
- Employee adoption of new workflows

What the Future Looks Like, at 24 Months

At maturity, Precision-led GTM delivers:

Key actions

- Micro-market precision
- Demand creation and fulfilment tightly coupled at local level
- Digital execution at scale without exponential cost
- A DOP acting as a growth control tower

What it achieves

Confidence that growth becomes repeatable, resilient and responsive to how India's consumers actually behave today

What this means for CXOs

"Transformation requires sequencing, not speed alone."

The organisations that lead are the ones prioritising the right interventions in the right order. Precision-led GTM rewards discipline, structured scale and long-term capability building.

Closing insight

India's consumer market continues to evolve faster than traditional GTM systems can respond. Success now demands an experience-led strategy that places stakeholders, from channel partners to customers, at the centre. Precision-led GTM offers leaders a practical, future-ready blueprint to win in a market defined by speed, fragmentation and premiumisation.

The path ahead requires structured sequencing

and leaders who master precision, speed and experience. Guided by data, powered by technology and shaped by consumer relevance, businesses that recalibrate their GTM architecture now can define the future of India's consumption economy.

In India's next growth cycle, advantage increasingly shifts toward organisations with sharper, more adaptive operating models.



Why KPMG in India?



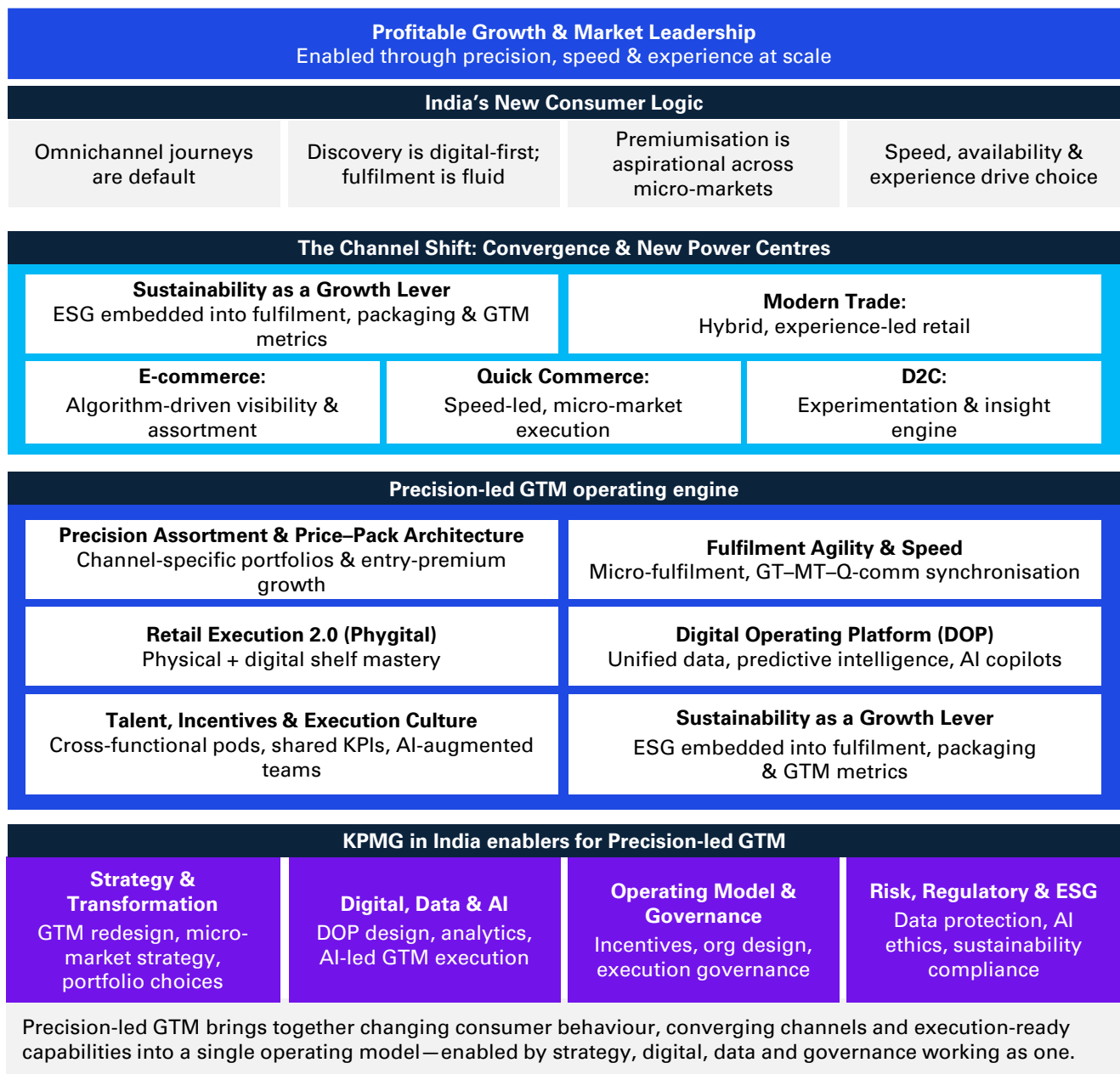
Precision-led GTM demands a fundamentally re-architected go-to-market operating model. Leaders must rethink where to play, how to win and how to scale consistently across India's diverse micro-markets.

The framework below brings together the forces reshaping demand, the channels where value is shifting and the execution levers required to compete at speed. At its core is a digitally enabled

GTM engine that senses demand early and responds decisively.

KPMG in India supports organisations across this journey by aligning strategy, digital, data, operating models and ESG considerations into a coherent Precision-led GTM blueprint. The objective is not just growth, but profitable, resilient and experience-led market leadership in India's fastest-evolving consumer landscape.

Precision-led GTM:



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