



Digital Disruptors: The Global Competitive Landscape of Delivery Platforms

May 2024

INTRODUCTION

Scope

Key findings

STATE OF PLAY

The global pandemic accelerated growth in on-demand delivery

Business models of various delivery platforms

Demand for delivery services normalises in the aftermath of the pandemic

Mobile apps, the primary platforms used to access online delivery, are increasingly popular

Despite intensified competition, the delivery market is more consolidated than ever

Delivery platforms are leveraging core capabilities to diversify revenue streams

Regulation poses a serious threat to the sustainability of the business model

PROFILES OF DELIVERY DISRUPTORS

Deliveroo (Deliveroo Plc)

Delivery Hero (Delivery Hero SE)

DoorDash (DoorDash Inc)

Getir (Getir Perakende Lojistik AS)

GoFood/GoMart (GoTo Group)

Grab (Grab Holdings Inc)

iFood (iFood.com Agencia de Restaurantes Online SA)

Instacart (Maplebear Inc)

Just Eat Takeaway.com (Just Eat Takeaway.com NV)

Meituan (Meituan Inc)

Mrsool (Mrsool Inc)

Rappi (Rappi Inc)

Uber Eats (Uber Technologies Inc)

Yogiyo (GS Holdings Corp)

Zomato (Zomato Ltd)

PROSPECTS

The delivery landscape will continue to benefit from diversifying offerings

Emerging technologies provide a path for long-term sustainable growth

The on-demand delivery industry is likely to face more competitive and regulatory challenges

Key factors shaping the future of third party delivery platforms

About Euromonitor's Syndicated Channels Research

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/digital-disruptors-the-global-competitive-landscape-of-delivery-platforms/report.