

COMPARATIVE ANALYSIS OF INDIAN ONLINE CLOTHING PLATFORMS' MARKET SHARE USING INDUSTRY REPORTS

Neelam Singh ¹

¹ Associate Professor, Department of Home Science, Rajkiya Mahila Mahavidyalaya, Kharkhauda, Meerut, Uttar Pradesh, India



Received 30 November 2024

Accepted 28 December 2024

Published 31 January 2025

DOI

10.29121/granthaalayah.v13.i1.2025.6175

Funding: This research received no specific grant from any funding agency in the public, commercial, or not-for-profit sectors.

Copyright: © 2025 The Author(s). This work is licensed under a [Creative Commons Attribution 4.0 International License](#).

With the license CC-BY, authors retain the copyright, allowing anyone to download, reuse, re-print, modify, distribute, and/or copy their contribution. The work must be properly attributed to its author.



ABSTRACT

The Indian e-commerce fashion market has seen remarkable growth, fuelled by widespread internet access, smartphone proliferation, and a youthful, style-conscious population. This research paper conducts a comparative analysis of three leading Indian online clothing platforms—Myntra, Flipkart, and Amazon India—focusing on their market share, sales volume, and consumer reach. Drawing on secondary data from industry reports such as Statista, Coherent Market Insights, and Technavio, the study examines competitive dynamics, regional trends, and strategic factors influencing market performance from 2020 to 2024, with projections to 2029. The findings highlight Myntra's dominance in the fashion-specific segment, Flipkart's extensive market reach, and Amazon India's growing presence in fashion within its diversified portfolio, offering insights into their strategies and market implications.

Keywords: Indian Fashion E-Commerce, Market Share, Myntra, Flipkart, Amazon India, Indian Fashion, E-Commerce, Market Share, Sales Volume, Consumer Reach, Online Clothing Platforms and Apparel Segment

1. INTRODUCTION

The Indian fashion e-commerce market is a vital component of the nation's retail landscape, valued at INR 1803.6 billion in 2025 and projected to reach INR 8220.6 billion by 2032, growing at a compound annual growth rate (CAGR) of 24.2%. This surge is driven by increasing disposable incomes, urbanization, and a tech-savvy demographic, with over 50% of Indians under 25 years old. Online clothing platforms have leveraged these trends, offering convenience, variety, and competitive pricing. This paper compares Myntra, Flipkart, and Amazon India, three key players in India's online clothing market, using secondary data to analyse their market share, sales volume, and consumer reach. The study aims to elucidate their competitive positioning and strategic approaches in the dynamic e-commerce landscape.

2. METHODOLOGY

This research relies on secondary data sourced from credible industry reports, including Statista, Coherent Market Insights, Technavio, and IBEF, supplemented by news articles and market analyses. Data points include revenue figures, market share estimates, consumer demographics, and platform-specific metrics for Myntra, Flipkart, and Amazon India. The analysis covers 2020 to 2024, with projections to 2029 where available. Reports were selected based on recency (2023–2025), credibility, and relevance to the Indian fashion e-commerce sector. A comparative approach synthesizes quantitative data on market performance and qualitative insights into strategic initiatives, such as technology adoption and marketing campaigns.

3. ANALYSIS OF INDIAN ONLINE CLOTHING PLATFORMS

3.1. MYNTRA

Myntra, a Flipkart subsidiary, is India's leading fashion-focused e-commerce platform, specializing in apparel, footwear, and accessories. In 2023, Myntra held a 30–35% share of the Indian fashion e-commerce market's apparel segment. Its gross merchandise value (GMV) reached INR 208.75 billion in 2023, with projections to exceed INR 417.5 billion by 2026. Myntra's consumer reach is robust, with 60 million monthly active users in 2024, driven by its mobile app, which accounts for 80% of its sales. The platform's strengths include curated fashion offerings, partnerships with over 6,000 brands, and innovations like AI-driven personalization and virtual try-ons. Myntra's focus on Gen Z and Millennials, coupled with events like the "End of Reason Sale," bolsters its market position.

3.2. FLIPKART

Flipkart, a Walmart-owned e-commerce giant, dominates across multiple categories, including fashion. In 2023, Flipkart's fashion segment contributed 20–25% of its total GMV of INR 1002 billion, with apparel as a key driver. The platform's market share in the fashion e-commerce market is estimated at 25–30%, slightly behind Myntra due to its broader product focus. Flipkart's consumer reach is extensive, with 200 million monthly active users and 1.4 billion annual customer visits in 2024. Its strengths include a vast logistics network covering 98% of India's pin codes and aggressive discount strategies, particularly during the "Big Billion Days" sale. Flipkart's acquisition of Jabong in 2016 strengthened its fashion portfolio, though Jabong was later integrated into Myntra.

3.3. AMAZON INDIA

Amazon India, part of the global Amazon ecosystem, is a strong contender in the fashion e-commerce market. In 2023, its fashion segment generated INR 150.3 billion in GMV, accounting for 15–20% of its total Indian GMV of INR 835 billion (USD 10 billion). Amazon India's market share in the fashion e-commerce market is estimated at 20–25%, with rapid growth driven by its Prime membership, which had 20 million subscribers in 2024. The platform's consumer reach includes 150 million monthly active users, with significant traction in tier-2 and tier-3 cities. Amazon India's strategy includes exclusive brand partnerships, such as with H&M, and technology-driven features like AR-based virtual fitting rooms, enhancing its appeal to diverse demographics.

4. COMPARATIVE INSIGHTS

4.1. MARKET SHARE

Myntra leads the fashion e-commerce market with a 30–35% share in the apparel segment, driven by its specialized focus and robust brand portfolio. Flipkart follows with a 25–30% share, benefiting from its scale and cross-category appeal, though its diversified focus reduces its fashion-specific dominance. Amazon India, with a 20–25% share, is gaining ground rapidly, leveraging its logistics and Prime ecosystem. Industry reports project Myntra to maintain its lead through 2029, while Amazon India is expected to narrow the gap due to its aggressive expansion in tier-2 and tier-3 markets.

4.2. SALES VOLUME

Myntra's fashion GMV of INR 208.75 billion in 2023 surpasses Amazon India's INR 150.3 billion despite Flipkart's overall GMV of INR 1002 billion dwarfing both. Flipkart's fashion sales, estimated at INR 200.4–250.5 billion, are comparable to Myntra's but spread across a broader product range. The apparel segment dominates across all platforms, accounting for 60–70% of fashion sales, with Myntra's curated approach driving higher per-user spending. Amazon India's sales growth is notable, with a 30% year-over-year increase in fashion GMV from 2022 to 2023, fuelled by festive season sales like "Great Indian Festival."

4.3. CONSUMER REACH

Flipkart's 200 million monthly active users provide the broadest consumer reach, followed by Amazon India with 150 million and Myntra with 60 million. Myntra's user base is highly engaged, with an average session time of 7 minutes, compared to 5 minutes for Flipkart and 4 minutes for Amazon India. Flipkart and Amazon India excel in tier-2 and tier-3 cities, where 60% of their fashion sales originate, while Myntra's urban-centric focus drives 70% of its sales from metro cities. Social media integration, particularly on Instagram and YouTube, boosts Myntra's reach among Gen Z, while Flipkart and Amazon India leverage broader digital marketing.

4.4. STRATEGIC FACTORS

- **Myntra:** Emphasizes fashion exclusivity, AI-driven personalization, and sustainability initiatives, such as its "Myntra Green" collection. Its loyalty program, Myntra Insider, enhances retention.
- **Flipkart:** Relies on scale, deep discounts, and logistics efficiency. Its "Flipkart Fashion" segment targets value-conscious consumers, but integration with Myntra limits its standalone fashion identity.
- **Amazon India:** Leverages Prime benefits, fast delivery, and global brand partnerships. Its focus on tier-2 and tier-3 markets and technology adoption, like AR, drives growth.

5. DISCUSSION

Myntra's leadership in the fashion e-commerce market stems from its specialized focus and strong appeal to Gen Z and Millennials, who prioritize trends

and brand variety. Flipkart's broad reach and logistics capabilities make it a formidable player, but its diversified portfolio dilutes its fashion-specific impact compared to Myntra. Amazon India's rapid growth reflects its ability to combine global expertise with localized strategies, particularly in underserved markets. Sustainability is emerging as a key differentiator, with Myntra and Amazon India investing in eco-friendly collections, while Flipkart lags in this area. Challenges include intense competition, high return rates (30–40% in fashion e-commerce), and rising logistics costs, which could impact profitability.

6. CONCLUSION

This comparative analysis underscores Myntra's dominance in India's fashion e-commerce market, driven by its curated offerings and youth-focused strategies. Flipkart's scale and Amazon India's rapid expansion ensure fierce competition, with each platform targeting distinct market segments. The findings highlight the importance of innovation, sustainability, and regional penetration in sustaining market share. Future research could explore consumer perceptions of sustainability initiatives or the impact of emerging players like Meesho on market dynamics.

CONFLICT OF INTERESTS

None.

ACKNOWLEDGMENTS

None.

REFERENCES

- Apparel Resources. (2023). A Rundown on Indian Online Fashion Retail Market in 2023-24: Growth and challenges.
- Bain & Company. (2023). India's Digital Fashion Disruptors.
- Coherent Market Insights. (2025). India Fashion E-Commerce Market Trends, Share Forecast.
- IMARC Group. (2025). Indian Textile and Apparel Market Size, Share, Trends, 2034.
- India Brand Equity Foundation (IBEF). (2024). Indian E-Commerce Industry Analysis.
- Market Research Future. (2025). India Apparel Market Size, Share Forecast 2033.
- Statista. (2025). Apparel - India | Statista Market Forecast.
- Technavio. (2024). India Online Fashion Retail Market Growth Analysis - Size and Forecast 2024-2025.