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BigBasket's Crossroads: Quick Commerce, Super Apps, and a Fading Lead

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On a rainy July afternoon in 2025, Hari Menon stared at a single slide on the large screen in Tata Digital's 11th-floor boardroom in Bengaluru.

The title was bland: "BigBasket-Strategic Priorities, FY26-FY28." The numbers underneath were not.

For the first time since its founding, India's pioneering online grocer was growing slower than the market it had helped create. Competitors that barely existed four years ago now dominated the fastest-growing segment of that market.

"Let's be honest," said Ananya Rao, BigBasket's head of product, breaking the silence. "In *quick* commerce, we are an also-ran."

Hari's eyes moved to the bottom-right of the slide: a small footnote referencing an analyst report. According to the latest estimates, Blinkit, Zepto and Swiggy Instamart together controlled a little over 90% of India's quick commerce gross merchandise value (GMV), with Blinkit alone approaching or crossing the 50% mark in recent quarters. Tata's BigBasket once the largest name in online grocery was now clubbed with "Others." Internally, the team's estimate of BigBasket's share in quick commerce GMV sat in the low single digits.

From the other side of the table, Tata Digital's CFO, Vikram Deshpande, tapped his pen.

"Let's not forget," he said, "the group has already put in significant capital. Our shareholders are going to ask two questions: *What is the path to profitability?* And *when do we go to market?*"

By "market," everyone in the room knew he meant a public listing. Internally, Tata had signalled that BigBasket would need to move towards an IPO or large external funding round within the next 18-24 months. The days of open-ended capital support were over.

Hari flipped to another slide. The charts were familiar, yet unsettling.

Revenue from operations had reached around ₹9,900 crore in FY2024-25, according to internal estimates aligned with recent filings.

Net losses had widened to just over ₹2,000 crore, driven by investments in dark stores, discounts and marketing for its 10-minute delivery offering, BB Now.

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An internal report summarising reviews on app stores and independent platforms showed a worrying pattern: complaints of late deliveries, stock-outs, poor-quality produce, and refunds stuck in wallets had risen sharply over the last two years.

"This is not the BigBasket we built," Hari thought.

For nearly a decade, BigBasket had been synonymous with trust in online groceries. When the Tata Group acquired a majority stake in 2021, valuing the business at roughly $1.8-1.9 billion and taking about a 64% holding, the deal had been hailed as a win for both sides: Tata would gain a high-engagement digital "daily use" anchor for its upcoming super app, Tata Neu, and BigBasket would gain deep pockets and a powerful offline backbone.

Four years later, the picture looked more complicated. In less than an hour, Hari would have to walk into a joint steering committee with senior leaders from Tata Digital and Tata Sons. On the agenda: BigBasket's three-year strategy, its role inside Tata Neu, and the feasibility of an IPO before the end of FY2027.

He closed his laptop briefly and looked out at the grey Bengaluru skyline.

"Are we still India's online grocer," he wondered, "or just another tile on a super app that people hardly open?"

From Early Failure to Category Creator

BigBasket's story did not begin in 2011. It began more than a decade earlier, with a failure.

In the late 1990s, Hari and some of his co-founders had launched Fabmart, one of India's earliest e-commerce marketplaces. The idea was ahead of its time: an online store for books, music and groceries when broadband was scarce and online payments were clunky. The venture ultimately morphed into an offline chain and was sold, but the founders walked away with a deep understanding of Indian retail operations, margins and consumer behaviour.

When they regrouped to launch BigBasket in 2011, they made two deliberate choices:

Groceries, not gadgets - Groceries were unsexy but universal. Households bought staples every week; whoever owned that relationship would earn frequent visits and rich data.

Inventory-led, not just marketplace - Instead of only aggregating neighbourhood kirana stores, BigBasket would operate its own warehouses, cold chains and last-mile fleet, sourcing directly from farms and large suppliers to control quality and margins.

For urban working families, the value proposition was simple:

Build a weekly or monthly basket,

Choose a convenient delivery slot, and

Trust that the vegetables and fruits arriving at the door would be at least as good as what they'd find in a local market.

Demand accelerated after the COVID-19 pandemic. By early 2022, BigBasket was processing over 7 million orders per month, as customers who had tried online grocery during lockdowns continued using the service.

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Revenue climbed steadily:

FY2020 operating revenue was estimated at around ₹3,800 crore, up more than 30% year-on-year.

By FY2023, combined B2B and B2C revenue had crossed ₹9,400–10,000 crore, according to regulatory filings and industry trackers.

Independent reports placed BigBasket's share of India's online grocery market at roughly 35–40% by the late 2010s far ahead of Amazon Pantry/Fresh and Grofers (later Blinkit).

Exhibit 1 - Big Basket's Scale and Financials, FY2017-FY2025

FY (ending March)	*Approx. Cities Served*	*Approx. Avg. Orders / Day*	*Revenue from Operations (₹ crore) **	*Net Profit / Loss (₹ crore) **	*Key Funding / Ownership Events*
FY2017	*8 large metros*	*20,000*	*1,180 (wholesale arm)*	*-653 (wholesale arm)*	*Supermarket Grocery Supplies (wholesale arm) scales to ₹1,176 crore revenue; heavy losses as model is built out.*
FY2018	*10-12 cities*	*30,000*	*1,410 (consumer arm)*	*-179 (consumer arm)*	*Revenue from operations for Innovative Retail Concepts (consumer business) grows strongly; losses narrow vs FY2017.*
FY2019	*25 cities*	*50,000-60,000*	*2,381 (consumer arm)*	*-348 (consumer arm)*	*BigBasket operates across 25 cities and becomes India's largest e-grocer; revenue from operations jumps 69% YoY.*
FY2020	*25+ cities*	*100,000*	*3,794 (consolidated operating revenue)*	*-611 (net loss, approx.)*	*Revenue up 36% YoY to ₹3,800 crore; losses rise modestly as scale and marketing spend increase.*

FY2021	***30 cities***	***150,000-180,000***	***6,500-7,000 (incl. strong B2B growth)***	***-300 to -400 (approx.; losses shrink in B2B arm)***	***Alibaba-backed BigBasket sees B2B revenue grow 73% to ₹6,558 crore; Tata Digital agrees to acquire 64% majority stake, valuing company at US$1.85 billion.***
FY2022	***30+ cities (incl. 18 tier-2/3)***	***230,000 (7 million orders / month)***	***7,000+ (consumer arm; revenue crosses ₹7,000 crore)***	***-1,300 to -1,400 (losses 4x previous year, approx.)***	***Demand surges post-COVID; BigBasket processes >7 million orders/month and expands into tier-2/3 cities. Revenue crosses ₹7,000 crore; losses spike as investments in growth and quick commerce ramp up.***
FY2023	***35 cities***	***250,000-300,000***	***9,468.5 (consolidated revenue from operations)***	***-1,750 consolidated net loss (Tata Sons annual report)***	***BigBasket's consolidated revenue crosses ₹9,400 crore; total losses nearly double to ₹1,750 crore as quick commerce and Neu integration spend rise. Company receives US$200m funding, valuation US$3.2b.***
FY2024	***35 cities***	***300,000-350,000***	***10,061.9 (consolidated revenue from operations)***	***-1,415 consolidated net loss (various filings)***	***Revenue crosses the ₹10,000 crore mark; losses reduce somewhat vs FY2023, though the business remains in the red. BigBasket anchors Tata Neu's grocery and quick-commerce play.***
FY2025	***35 cities (plan to***	***350,000-400,000+***	***9,866.7 (operating***	***-2,006.8 net loss***	***Tata Digital-owned BigBasket's revenue***

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	reach 70 by FY2026)	*(majority from quick commerce)*	*revenue; slight 2% dip YoY)*	*(consolidated; 42% wider than FY2024)*	*dips slightly amid intense quick-commerce competition; net loss crosses ₹2,000 crore. CEO signals plan for an India IPO in 18-24 months and expansion from 35 to 70 cities, with 80% of revenue and orders now coming from quick commerce.*

For almost a decade, BigBasket was not just in the category; it was the category.

Tata's Big Bet on Groceries and the Neu Vision

By 2020-21, another shift was underway. Global tech giants and Indian conglomerates were racing to build multi-category digital ecosystems. Reliance had JioMart and an expanding portfolio of partners. Amazon was deepening its India presence. Flipkart was moving into more categories. For Tata, with brands spanning jewellery (Tanishq), fashion (Westside), electronics (Croma), airlines and hotels, the missing piece was a high-frequency digital anchor.

Internally, Tata Digital was incubating Tata Neu, a "super app" designed to unify Tata's consumer businesses under one roof, with a single login, loyalty currency (NeuCoins) and credit card products.

Groceries were crucial to this vision. People might buy jewellery or electronics once in a while but they bought milk, rice, and vegetables every week.

After months of speculation, Tata Digital announced in May 2021 that it had acquired a majority stake (about 64%) in BigBasket's holding company, Supermarket Grocery Supplies. Press reports suggested a transaction value of roughly ₹9,500 crore (about $1.2 billion), valuing BigBasket near $1.8-1.9 billion.

The strategic logic seemed straightforward:

Tata would gain a daily-use digital habit to bring consumers into Tata Neu.

BigBasket would gain capital and credibility to expand into hundreds of additional towns.

Both sides could explore synergies with offline formats (e.g., Tata's Star Bazaar stores, BigBasket's later "Fresho" stores) and cross-selling other Tata products.

Exhibit 2 - BigBasket Timeline of Key Strategic Events (2011-2025)

Year / Period	*Strategic Event*	*Strategic Significance*
1999-2006	*Fabmart / Fabmall experiment - Hari Menon and co-founders launch one of India's earliest e-commerce ventures, then pivot to offline and exit.*	*Early learning on Indian retail operations, supply chains and consumer behaviour; failure becomes foundation for later BigBasket model.*

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2011	***BigBasket founded in Bengaluru as a full-stack online grocer with warehousing, cold chain and in-house last-mile delivery.***	***Chooses inventory-led model instead of pure marketplace; positions itself as reliable alternative to kirana and wet markets.***
2013-2015	***Rapid city expansion beyond Bengaluru into major metros (Hyderabad, Chennai, Mumbai, Delhi).***	***Builds national brand recognition; tests operations in different city formats and consumer segments.***
2015-2017	***Multiple funding rounds from investors such as Helion, Ascent, Bessemer, and others; entry of early strategic investors.***	***Provides capital for fulfilment centres, technology and marketing; BigBasket emerges as category leader in online grocery.***
FY2017-FY2018	***Revenue from operations crosses ₹1,400 crore, then ₹2,300+ crore; losses remain high but growth is strong.***	***Confirms scalability of full-stack model; company prioritises market-share growth over short-term profitability.***
2018-2019	***Alibaba invests ($200M) and other investors join; BigBasket operating in 25 cities, handling 100k orders/day.***	***Validates BigBasket as national e-grocery leader; provides further funds to deepen sourcing and private labels.***
FY2020	***Operating revenue reaches ₹3,800 crore; BigBasket entrenched as largest online grocer with 35-40% share of online grocery.***	***Strengthens bargaining power with suppliers; sets stage for consolidation or strategic sale.***
2020 (COVID-19)	***Pandemic lockdowns drive huge spike in online grocery demand; BigBasket struggles with slots and capacity, then scales up.***	***Millions of new customers try online grocery; category adoption accelerates by several years.***
2021 (Pre-Tata deal)	***B2B revenue surges (especially HoReCa, kirana supply); overall sales exceed ₹6,500 crore.***	***Demonstrates robustness of both B2B and B2C lines; makes BigBasket attractive acquisition target.***
May 2021	***Tata Digital acquires 64% stake in BigBasket's parent at a valuation of US$1.8-1.9 billion.***	***BigBasket becomes part of Tata Group; positioned as grocery anchor for upcoming Tata Neu super app.***
2021-2022	***BigBasket integrated into Tata Neu roadmap; early work on NeuCoins, unified login and cross-selling with other Tata brands.***	***Shifts product & tech roadmap from standalone app focus to ecosystem alignment; introduces new governance layers.***

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Late 2021-2022	***Launch of BB Now quick commerce in select cities; dark store pilot network rolled out.***	***BigBasket responds to Blinkit, Zepto, Instamart; starts building presence in 10-20 minute delivery segment.***
FY2022	***Orders exceed 7 million per month across 30+ cities; revenue crosses ₹7,000 crore; losses spike due to heavy investments.***	***Confirms scale but exposes cost of pursuing quick commerce and expansion simultaneously.***
April 2022	***Public launch of Tata Neu super app with BigBasket as grocery module.***	***Customers now access BigBasket via Neu as well as legacy app; UX and performance issues begin to surface.***
FY2023	***Consolidated revenue ₹9,400+ crore; net loss ₹1,700+ crore; BigBasket recognised as anchor business in Tata Neu.***	***Growth continues but profitability deteriorates; quick commerce spends and Neu integration costs weigh on P&L.***
2023-2024	***Quick commerce in India scales rapidly; Blinkit, Zepto and Instamart together capture >90% of segment GMV, with Blinkit leading.***	***BigBasket's BB Now remains a small player; strategic urgency to define its positioning intensifies.***
FY2024	***Revenue crosses ₹10,000 crore; losses reduce modestly but remain substantial; Neu continues to face adoption and UX challenges.***	***Demonstrates top-line strength but highlights structural profitability issues and integration friction.***
2024-Early 2025	***Management publicly signals that 80% of business is now quick commerce; announces plan to double business by March 2026 and expand from 35 to 70 cities; IPO or large funding round discussed.***	***Marks pivot towards quick commerce as core; sets ambitious growth targets under capital and profitability constraints.***
July 2025 (Case moment)	***Hari Menon prepares for Tata Digital steering committee meeting to decide Big Basket's role in quick commerce, Tata Neu and path to IPO.***	***Strategic crossroads: must choose focus between speed vs planned baskets, super app integration vs vertical focus, and growth vs profitability.***

From the outside, it looked like a textbook case of strategic fit. On the inside, integration would prove more complex.

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The Ten-Minute Shock

The first time Hari saw a pitch deck promising “10-minute grocery delivery”, he remembers chuckling. It sounded like a marketing gimmick designed for investor decks, not real consumers.

By 2022, companies such as Blinkit, Zepto and Swiggy Instamart were proving otherwise. They operated dense networks of dark stores small, urban warehouses located within a few kilometres of their target customers. Orders were batched and routed through highly optimized systems designed to hit delivery times of 10-20 minutes.

Initially, quick commerce focused on “top-up” baskets: milk forgotten at night, snacks for guests, a last-minute ingredient. But as the model scaled, consumers began to treat these apps as their default first choice for many everyday items.

By 2024, a report by Bain & Company and Flipkart estimated that India’s quick commerce sector had grown to around $6-7 billion in GMV, accounting for more than two-thirds of all e-grocery orders and about 10% of total e-retail spending. Projections suggested a 40%+ annual growth rate toward 2030 if the economics could be made sustainable.

Brokerage and industry analyses during late 2024 and 2025 indicated that:

Blinkit held roughly 46-50% share of quick commerce GMV.

Zepto and Swiggy Instamart together accounted for most of the remaining share, with city-level variations.

BigBasket’s own quick-commerce offering, BB Now, was a late entrant and a relatively small player in the segment.

Exhibit 3 - Selected Operational and Business Model Metrics

Let’s now create Exhibit 3 as a compact, high-use exhibit that faculty can use to discuss operations, economics, and positioning.

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Exhibit 3 - Selected Operational Metrics and Business Model Indicators (Illustrative)

Dimension / Metric (circa 2022-2025)	*Approximate Value / Description*	*Strategic Insight / Teaching Hook*
Cities served (FY2025)	*35 cities active; management target of 70 cities by March 2026.*	*Shows tension between depth (unit economics) and breadth (geographic expansion) under capital constraints.*
Order volume (2022)	*>7 million orders per month (230,000+ orders/day) during post-COVID growth.*	*Demonstrates scale of planned e-grocery model and customer habituation to online grocery.*
Order volume mix (2025)	*Internal estimates indicate majority of orders now from quick commerce (BB Now), with planned baskets a smaller share.*	*Indicates strategic pivot; raises question whether legacy brand meaning (planned, reliable baskets) is being diluted.*
Average order value - planned baskets	*Higher AOV (e.g., ₹1,200-₹1,800) for weekly / monthly orders with staples, fresh and packaged goods combined.*	*Supports better unit economics and contribution margins when logistics are route-optimised.*
Average order value - quick commerce	*Lower AOV (e.g., ₹300-₹600) for impulse / top-up baskets, often 3-6 items.*	*Requires very high order frequency and efficient dark-store operations to break even; magnifies importance of density.*
Delivery promise - planned	*Scheduled delivery slots (e.g., 2-hour windows) with ability to book in advance.*	*Competes on reliability, range and price rather than speed; appeals to planners and families.*
Delivery promise - quick commerce	*10-20 minutes delivery promises in dense urban zones via dark stores.*	*Competes directly with Blinkit, Zepto, Instamart on speed and availability; operationally costlier.*

Network design -planned	*Large city-level fulfilment centres with zonal hubs; truck + bike delivery routes.*	*Economies of scale in storage and procurement; complexity in route planning and slot management.*
Network design - quick	*Dozens/hundreds of small dark stores located 1-3 km from customers; bike-based last mile.*	*High fixed cost per micro-catchment; service quality depends on assortment, stock accuracy and picker efficiency.*
Product & assortment focus	*Broad assortment (staples, fresh, FMCG, private labels); emphasis on basket completion in planned model; curated "fast-moving essentials" in quick commerce.*	*Trade-off between carrying long tail vs tightening SKUs for speed and freshness; opportunity to push private label.*
Private label contribution	*Significant share of revenue in staples and select categories; higher margins vs third-party brands.*	*Key lever for improving contribution margin; sensitive to brand trust and perceived quality.*
Customer acquisition channels	*Mix of app-store search, performance marketing, referrals, and now Neu cross-traffic; promotions and NeuCoins integration.*	*Raises question: does Neu actually send incremental, high-quality traffic to BigBasket or add UX friction?*
Customer complaints (relative)	*Rising incidence of complaints about late deliveries, cancellations, quality of fresh produce and wallet refunds; sentiment more mixed vs earlier years.*	*Signals brand erosion risk; useful to discuss service recovery, trust and NPS in a disrupted category.*
Cost drivers - quick commerce	*High per-order delivery cost, dark-store rent and staff, discounting for share; technology and routing complexity.*	*Helps analyse whether BB Now can be profitable at scale or must rely on cross-subsidy / ecosystem value.*
Cost drivers - planned	*Warehouse capex, inventory holding, route optimisation, customer acquisition for broader baskets.*	*Allows comparison of per-order economics and capital intensity vs quick commerce.*

Inside BigBasket, the leadership team tried to respond without losing sight of the original business:

The company launched BB Now in select cities, promising fast delivery from mini-warehouses.

At the same time, it continued to invest in its slot-based planned grocery model, with central warehouses and route-optimized truck fleets.

All of this had to be integrated into Tata Neu's broader product and loyalty roadmap.

"We are trying to be two companies at the same time," Ananya had said in a previous product review meeting. "A planned, large-basket business and an instant-delivery business. But our app, our brand, and our operations are not clearly telling customers which one we really are."

Hari had defended the dual strategy then. But as he looked at the quick commerce numbers in mid-2025, he wondered if they had underestimated how quickly customer expectations would shift.

Box 1: Quick Commerce Vs Planned E-Grocery - Two Different Jobs

Although both models sell groceries, their economics and psychology differ:

• Planned e-grocery (BigBasket's original model)

Larger basket sizes, lower frequency.

Central warehouses, scheduled routes.

Emphasis on range, price and reliability.

• Quick commerce (BB Now, Blinkit, Zepto, Instamart)

Small, frequent baskets; impulse and top-up items.

Dense dark-store networks near customers.

Emphasis on speed and availability; higher delivery costs per order.

The question facing BigBasket was not only operational: it was strategic. Could one brand and one app credibly excel at both jobs?

Exhibit 4 - Snapshot of Customer Sentiment (Illustrative)

You can adjust the wording/ratings if you want to anonymise further. This is designed to be realistic but not defamatory, and to support discussion on service quality, NPS, and brand erosion.

Exhibit 4 - Selected Customer Feedback on BigBasket and Quick-Commerce Rivals (Illustrative)

Platform & Brand	*Rating (Illustrative)*	*Excerpt (Paraphrased / Anonymised)*	*Theme Code(s)*
BigBasket - Google Play Review (2024)	★☆☆☆☆	*"The app used to be reliable, but now deliveries are often late or cancelled at the last minute. Getting refunds is a hassle - they push everything into wallet credit instead of back to my bank account."*	*Delivery reliability; refunds & policies; app experience*
BigBasket - App Store Review (2024)	★★☆☆☆	*"Good range of products, but quality of vegetables has gone down. I've received wilted spinach and nearly expired bread multiple times. Customer support just says 'we'll look into it'."*	*Product quality (fresh); customer care responsiveness*
BigBasket - Consumer Forum Post (2023)	★★☆☆☆	*"I placed a big monthly order; half the items were marked 'out of stock' on the delivery day and I had to rush to the local store anyway. What's the point of planning in advance?"*	*Stock-outs; basket completion; reliability vs planning*
BigBasket - Social Media Comment (2023)	*(not rated)*	*"Ever since Tata Neu happened, the experience is confusing. I just want groceries, but I'm forced through a buggy super app. Payment failures and random logouts are common."*	*App UX; super app friction; Neu integration*

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BigBasket - Loyal Customer Email (Internal Sample)	★★★★☆	*"We still rely on BigBasket for our monthly groceries because of range and offers. However, we now use Zepto for last-minute items, since they are significantly faster."*	*Mixed sentiment; dual usage (planned vs quick); competitive benchmarking*
Zepto - Google Play Review (2024)	★★★★★	*"Groceries arrive in 10-15 minutes every time. Even if an item is missing, they inform quickly and refund instantly to my UPI. Great for last-minute needs."*	*Speed; reliability; refund process*
Blinkit - App Store Review (2024)	★★★★☆	*"Excellent for snacks, drinks and essentials. Prices can be higher than supermarket, but the convenience is worth it. App is fast and easy to use."*	*Convenience vs price; UX simplicity*
Instamart - Social Media Tweet (2023)	★★★★☆	*"Instamart has become my default for daily stuff. Occasionally they mess up fresh vegetables, but they refund quickly and customer support is responsive."*	*Service recovery; speed; quality exceptions handled well*

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Exhibit 5 - Comparative Customer Journey: Tata Neu / BigBasket vs Zepto (Illustrative)

Step	*Tata Neu / BigBasket Journey (Illustrative)*	*Zepto Journey (Illustrative)*	*Pedagogical Note*
1	*Open Tata Neu app. Splash screen with Neu branding, cross-category offers (flights, fashion, credit card, etc.).*	*Open Zepto app. Splash screen directly shows nearby store and "Groceries in 10 minutes" promise.*	*First-touch clarity: Neu promotes ecosystem; Zepto promotes a single job - instant groceries.*
2	*User may see banners for credit cards, electronics deals, hotel offers. Needs to locate "Groceries" or BigBasket tile.*	*User immediately sees search bar, categories like "Milk & Dairy", "Fruits & Vegetables", "Snacks".*	*Cognitive load: Neu requires more scanning; Zepto offers direct category affordances.*
3	*Tap on BigBasket tile - grocery module loads inside Neu; occasional loading delays or reloads reported by users.*	*User taps a category or types in search; product listing appears quickly with availability in local dark store.*	*Journey depth: extra module load for Neu; direct listing for Zepto.*
4	*Select items into cart; some items indicate slot availability or restricted delivery time.*	*Select items into cart; estimated delivery time (e.g., 11-16 min) shown prominently; substitutions sometimes suggested.*	*Promise difference: scheduled convenience vs immediate gratification.*
5	*Proceed to checkout -Neu payment page with multiple options (NeuCoins, Tata card, UPI, wallet). Some users report confusion about default payment or promo application.*	*Proceed to checkout - simple payment screen (UPI / card), with applied promo visible.*	*Simplicity vs ecosystem monetisation: Neu optimises for multi-product monetisation; Zepto for quick completion.*
6	*Order confirmation with slot window (e.g., "Today 7-9 PM"). Customer may exit Neu or be prompted with cross-sell (loans, flights, etc.).*	*Order confirmation with live tracking; user watches rider icon moving; real-time ETA updates.*	*Perceived control: real-time tracking reinforces certainty and satisfaction.*

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7	***If a problem occurs (payment error, timeout), user may need to re-open Neu, re-enter module, and rebuild basket.***	***If a problem occurs, Zepto often prompts quick retry with preserved cart.***	***Error recovery: extra friction in super app vs "single job" app; implications for NPS and retention.***