



Digital Disruptors: The Global Competitive Landscape of Delivery Platforms

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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

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