

The Rush Behind the Rush: How INDIA'S SUPPLY CHAINS KEEPS UP WITH THE FESTIVE SURGE

India's festive season is an annual stress test for its supply-chain and logistics ecosystem, compressing weeks of demand into a short window and putting warehouses, transport networks, inventory and last-mile operations under pressure. Behind the rush are months of forecasting, inventory positioning, capacity planning, seasonal hiring and technology investments. As demand becomes more fragmented across cities, categories and channels, companies must also respond when forecasts fall short.

In this cover story we look at what happens behind the festive shopping rush, from preparing capacity and warehouses to using technology and managing disruptions, and what the season reveals about the evolving maturity of India's logistics ecosystem.

» Karvi Rana



India's most loved season is here. Shoppers who spent the year browsing will now commit: smartphones and televisions, clothes and sneakers, sweets and gifting hampers, refrigerators and cars. For customers, it's all about big discount banners, a tap and a delivery slot. However, somewhere between a Navratri cart and a Diwali doorstep lies a network that has been preparing since the monsoon.

Over the next several weeks, from the first days of Navratri through Dussehra to the run-up to Diwali, the country will go through its most concentrated burst of buying. Demand will not build gradually. It will arrive in a rush. E-commerce platforms are already lining up their marquee sale events, while retailers, from neighbourhood kirana stores to national chains, are stocking shelves for a few weeks that can shape their entire year. As order volumes climb to multiples of a normal week and are compressed into days rather than months, the supply chain network will experience a shock.

Warehouses will fill beyond their usual capacity. Trucks, fleets and last-mile riders will be stretched across the country, while gifting, cash-on-delivery and returns will increase multifold.

Amid this seasonal chaos, a delay will not be just another inconvenience but a missed occasion. And that is what makes the festive peak the defining test of Indian logistics.

For the network, success during the season will not come through improvisation in the heat of the rush, but through preparations made months earlier: demand planning, inventory placement, warehouse hiring, carrier contracts and technology investments, all put in place long before the first sale goes live.



Capacity is often one of the biggest challenges during peak periods, but the industry's approach has evolved significantly. Today, success is less about reacting to demand surges and more about anticipating them. Companies are increasingly building capacity ahead of peak seasons through multimodal networks, flexible operating models and proactive resource planning. At DHL Express India, this forward-looking approach is fundamental to how we manage our network.

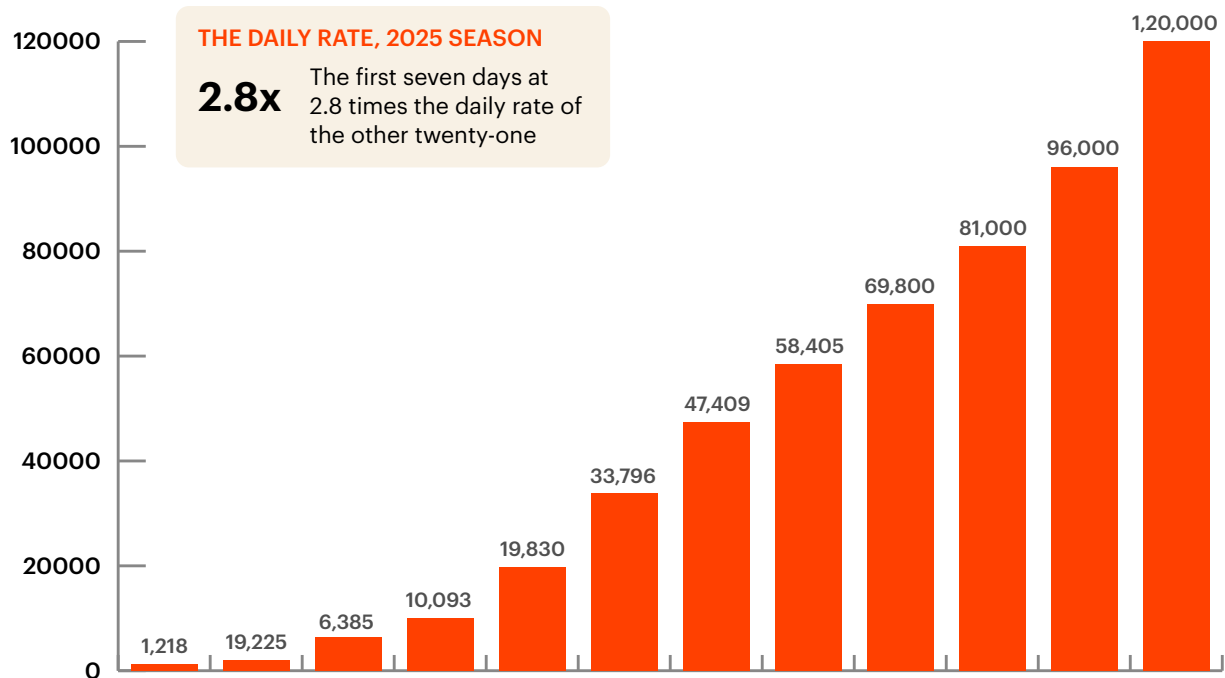
Manish Patel
VP- Operations
DHL Express India

Every one of those decisions rests on a single question that operators must answer before the surge arrives: how big will it be, where will it land, and when? That is where the real work of the season begins, with forecasting the surge. And the surge is getting bigger.

Forecasting the surge:

After breaking a three-year slowdown with 25% growth in 2025, India's festive online market is expected to maintain that pace this year. Datum's Festive Barometer Study 2026 forecasts online festive GMV of INR 1.50-1.55 lakh crore, up 25-29% from INR 1.20 lakh crore in 2025. That translates into another INR 30,000-35,000 crore of sales being added in a single festive season.

Festive online GMV, 2014 to 2025



2024 and 2025 are adjusted. Windows differ by year. 2014 was a single day, 6 October. Recent examples: 2022 ran 22 September to 27 October; 2024, 26 September to 3 November; 2025, 23 September to 20 October. 2026 is estimated to open 9 to 10 October, with Diwali on 8 November.

At a national level, that gives planners a reasonably clear sense of the opportunity. But no warehouse stocks "national GMV". The real challenge begins further down the chain: translating a national forecast into the right products, in the right quantities, at the right locations and at the right time. A forecast can be broadly right for India and still be wrong for Pune, a particular distribution centre or even a single SKU.

For Sandiip Kothaari, Supply Chain Expert, this is where the festive peak differs fundamentally from normal operations. "The most significant change is not simply the increase in volume. It is the compression of decisions, capacity and customer commitments into a much shorter operating window," he says.

That compression leaves little room for error. During normal periods, networks can absorb a degree of variation, but at festive peaks, a small forecasting error, delayed handover or capacity shortfall can quickly ripple through warehousing, transportation and last-mile operations. The response, Sandiip Kothaari argues, has to move from average efficiency to "controlled resilience"—with

earlier capacity commitments, scenario-based planning, clear escalation thresholds and closer coordination between shippers, logistics providers, warehouses, transporters and customer-facing teams.

"Peak readiness is not just about predicting how many orders will arrive. It is about placing the right products in the right locations, securing enough temperature-controlled capacity and responding quickly when reality differs from the plan," says Sameer Varma, Executive Director, ColdStar Logistics

"Forecasts will never be perfect. The advantage goes to the network that spots the deviation early, has practical alternatives ready and can respond without compromising either customer service or product integrity," he adds.

The nature of demand itself makes those calculations harder this year. Datum expects growth to come largely from volume, with around 20 million additional shoppers and more frequent purchases, even as the average basket size falls by 1.5%. Quick commerce is expected to account for 16% of festive sales, up from 12% last year, while grocery is forecast to grow 41%. Meanwhile, mobile sales, traditionally a major driver of festive e-commerce, are expected to grow by just 6%.

The festive season has grown every year since 2014, and 2025 reversed a three-year slowdown at 25%. **2026 is expected to hold that pace on volume alone: twenty million more shoppers, buying more often, at a smaller average basket.** The window opens sixteen days later, with Diwali on 8 November.

PART ONE, THE MARKET

Households are spending again, and delivery is ready for them

Urban households put non essential spending at a net of **plus 3.3 in July**, more than double the previous peak. Delivery moved 322 million parcels in the June quarter, up 55% with Ecom Express in the numbers, and Shadowfax 198 million, up 94%. Seasonal hiring is expected to run 16 to 25% higher.

+3.3

Urban
sentiment,
July
men and
theater a
romance

PART TWO, THE CONSUMER

Households plan to spend more, on credit that is getting scarcer

72% of households plan to spend more this season and 48% plan an increase above 10%, at a median of 312,500. Afterdrawable instalments rose seven points to 51% as a reason to buy, the largest move of any reason. Card issuance fell for a second year, though net additions have risen in each of the three months to July.

72%

Plan to
spend more
this season

48% plan
more than
10%

PART THREE, THE FORECAST

All of the growth comes from more orders

The season is expected to reach INR 1,50,000 to INR 1,55,000 crore (\$17.0 to 17.6 billion), up 25 to 29% on INR 1,20,000 crore in 2025. Twenty million more shoppers are expected to buy, and to buy more often, while the average basket falls 1.5%. Quick commerce is expected to take 16% of the season against 12 last year, and grocery to grow 41% against mobile at 6.

16%

Quick
commerce
share of
the season
against 12%
in 2025

WHAT IT MEANS

The basket is moving from phones to everyday goods

Households are spreading the same money across more, smaller orders, and buying groceries and home goods where they once bought a phone. **Quick commerce is expected to take a sixth of the season, and mobile to give up 5.4 points of it.**

**35.2% >
29.8%**

Mobile's
share of the
season 2025
to 2026, a fall
of 5.4 points

For logistics networks, that means more orders, more frequently, with demand becoming increasingly fragmented and hyperlocal.

Manoj Tripathi, CEO, TCI Supply Chain Solutions, points to the limits of even the most carefully constructed forecast. "Forecasts are important, but they will never be perfect, particularly during a festive season characterised by sharp regional variations and rapidly changing customer demand," he says. At TCI, the focus is therefore on building flexibility and response capability into the network.

Real-time shipment and inventory visibility allows deviations to be identified early. When demand changes or a disruption occurs, teams can rebalance inventory, revise dispatch priorities, reroute shipments, switch transportation modes, activate additional capacity or adjust delivery schedules in consultation with customers.

TCI's integrated operating model adds another layer of flexibility by bringing together surface transport, warehousing, rail, coastal shipping, multimodal logistics and supply-chain planning capabilities. Rather than managing individual movements in isolation, the network can evaluate alternatives across different modes and routes. Control-tower monitoring, digital dashboards and AI-led route optimisation further support faster exception management.

That ability to respond becomes particularly important when the forecast is wrong.

Anil Kumar Mishra, National Logistics Head India (South Asia), Pladis Global, identifies three of the most critical decisions as demand forecasting, inventory positioning and transportation capacity booking. High-demand SKUs need to be identified early, inventory positioned closer



From a TCI perspective, the festive season changes logistics from a relatively steady operating cycle into a high-intensity, time-sensitive network operation.

TCI's integrated capabilities across surface transport, supply-chain solutions, warehousing, multimodal movement and technology-enabled visibility allow us to manage these changes as one connected network. Our focus is on maintaining throughput and service reliability while ensuring that safety, compliance and delivery quality are not compromised.

Manoj Tripathi
CEO
TCI Supply Chain Solutions

to consumption markets and transportation capacity secured before the peak arrives. But the forecast is only the starting point. When actual demand diverges significantly from projections, companies need to respond through dynamic inventory reallocation, expedited transportation, alternate sourcing and continuous monitoring of stock levels.



Technology and visibility have become central to the safe and reliable transportation of temperature-sensitive cargo. At CMA CGM, connected reefer solutions enable customers to benefit from near-real-time visibility of their shipments and access key information such as container location, temperature and other relevant conditions during transportation. 'Smart Reefer' provides exporters with greater visibility over cargo throughout its journey and helps support the temperature integrity required for sensitive commodities.

Anil Kumar Mishra
National Logistics Head India
(South Asia)
Pladis Global

That becomes particularly critical in categories where the cost of getting the forecast wrong is high.

Sameer Varma, Executive Director, ColdStar Logistics shares that at Coldstar the forecasting question extends beyond how many orders are expected. The company needs to determine

which products will see the strongest demand, where that demand will come from, how much capacity each distribution centre will require and how much chilled, frozen or ambient storage will be needed. It must also account for shelf life. For dairy, sweets, desserts, ice cream and ready-to-eat foods, a stock-out means lost sales, but excess inventory can lead to expiry, wastage and margin loss.

The objective, therefore, is not to hold as much inventory as possible. It is to maintain availability while staying within shelf-life and temperature limits. ColdStar uses AI-based forecasting and real-time inventory tracking to anticipate demand spikes and align supply with demand, while carefully deciding which products should be pre-positioned, how much each facility can hold and where contingency stock should sit for high-velocity channels such as quick commerce.

Yet even the most sophisticated forecast cannot account for every disruption. Weather, road congestion, airport constraints, capacity shortages and other unexpected events can quickly make the original plan obsolete.

Dilip Sharma, Chief Operating Officer, MOVIN Express, describes peak season as "the ultimate test of resilience, predictability and partnership". The answer, he says, is an elastic operating model supported by pre-engineered contingency plans. MOVIN uses centralised control towers for network-wide visibility, allowing teams to reroute shipments across alternative air and ground corridors when demand spikes or disruptions occur. Workforce reserves, flexible shifts, 24/7 facility operations and long-term carrier partnerships provide additional capacity when the network comes under pressure.

This is why forecasting the festive surge is no longer about arriving at a single number months before the first sale. The plan made in advance

sets the baseline, but live data determines how far that plan needs to bend. Search and cart behaviour, historical sales, pricing and regional patterns feed forecasting models, while real-time orders, conversion rates and inventory levels allow planners to re-forecast as the season unfolds.

The objective, as Tripathi puts it, is not to eliminate every disruption but to reduce its impact. A resilient festive supply chain is one that detects change early, communicates transparently, makes decisions quickly and continues to deliver with minimum service disruption.

And that brings the next challenge into focus: once companies have estimated the surge, they have to put the inventory in place to meet it, without tying up too much capital or leaving themselves with a warehouse full of unsold stock after Diwali.

Building Capacity Without Breaking the Bank

Forecasting the surge is only half the equation. Once companies have an estimate of what customers are likely to buy, the next question is where to put the inventory, and how much of it to hold, and how to secure capacity before the peak?

Capacity Crunch: Hiring, Assets, Space:

The first pressure point in a festive surge is capacity: enough people to handle the additional workload, enough vehicles to move it and enough operating space to keep shipments flowing. Unlike demand, however, capacity cannot always be added at the same speed. Hiring takes time, vehicles need to be secured, facilities have physical limits and transport capacity becomes increasingly expensive as the peak approaches.



The scale of seasonal hiring reflects the size of the challenge. Meesho expects to generate more than one million seasonal jobs across its seller and logistics ecosystem this festive season, including around 650,000 jobs across its seller network and 375,000 in logistics. Its logistics platform Valmo, along with

third-party partners, will scale capacity across delivery, sortation, delivery-centre operations and supervision. The company also expects around 3,000 front-end operations roles, with festive hiring 7-8% higher than last year.

For logistics operators, however, hiring is only one part of the equation. The additional workforce must be matched with shifts, vehicles, sorting capacity and operating hours. As volumes rise sharply over a compressed period, networks need enough flexibility to extend working windows and absorb demand without creating bottlenecks elsewhere.

"Capacity is often one of the biggest challenges during peak periods, but the industry's approach has evolved significantly. Today, success is less about reacting to demand surges and more about anticipating them," says Manish Patel, VP-Operations, DHL Express India.

At DHL Express India, that anticipation translates into capacity planning across its air, gateway, sorting and ground operations. Its integrated air-and-road infrastructure, supported by a virtual airline model that secures dedicated cargo capacity through long-term partnerships, allows the company to scale capacity on key trade lanes ahead of demand peaks. Network optimisation, resource planning and targeted capacity enhancements are undertaken months before the festive rush arrives.

The emphasis on advance planning is particularly important when demand has to be supported across multiple modes. Rather than relying entirely on capacity available in the spot market during the busiest weeks, logistics operators are increasingly securing vehicles, line-haul capacity and other resources in advance.

Dilip Sharma, says anticipated market growth of 20-25% requires the company to move beyond



Peak-season performance ultimately depends on the relationship between promise & execution. Speed attracts attention, but predictability builds trust. A realistic delivery commitment supported by visible capacity & early exception communication is more valuable than an ambitious promise that changes repeatedly. The strongest supply chains are the ones that maintain decision quality, operational visibility & customer trust while the network is under pressure.

Sandiip Kothaari
Supply Chain Expert

routine operational ramp-ups towards a multi-layered peak-readiness framework. "Relying on volatile spot procurement during high-demand periods introduces unacceptable operational risk," he says.

MOVIN is addressing this through an elastic operating model combining fixed hub infrastructure with digitally orchestrated air and ground line-haul capacity. The company has secured dedicated air cargo capacity and



At Allcargo Logistics, we are strengthening our approach by bringing together our Express Distribution & Consultative Logistics capabilities, supported by our nationwide network & a scalable workforce of around 9,000 during the peak season. Our investments in technology are helping us strengthen coordination across the network and respond to changing demand with greater speed & precision. This integrated approach enables us to help customers manage demand with greater flexibility and consistency; not just during peak periods, but throughout the year.

Ketan Kulkarni
Managing Director & CEO,
Allcargo Logistics

expanded ground fleets across critical corridors ahead of the peak. It has also activated 24/7 facility operations, trained workforce reserves and appointment-based delivery options to manage higher throughput.

The model highlights another critical aspect of peak planning: owned and partner assets

need to work together. A network may have its own hubs, facilities or dedicated capacity, but third-party transporters and logistics partners provide the flexibility to scale when volumes move beyond the normal operating range.

Customer coordination also becomes part of capacity planning.

Dilip Sharma further shares that MOVIN works with enterprise customers to align volume forecasts, pickup cut-offs and fulfilment schedules in advance, allowing capacity to be matched more closely with when and where shipments are expected to enter the network.

The requirement is even more complex in temperature-controlled logistics, where capacity cannot be measured simply in terms of vehicles or warehouse space.

Sameer Varma says ColdStar increased its workforce by 15% this year to prepare for an anticipated 20-25% rise in demand across categories including festive gifting, sweets and confectionery, ready-to-eat foods, ice cream and healthy snacking.

"Storage space alone is not enough," Sameer Varma says. Capacity has to extend across people, vehicles, receiving docks, picking and packing operations, quality checks and last-mile coverage.

For ColdStar, which operates across more than 200 cities and 7,000 pin codes, this adds another layer to the festive capacity challenge, he says adding that the products have to be positioned close to the markets where demand is expected while maintaining temperature control throughout the journey. More volume therefore requires not just additional manpower or vehicles, but sufficient capacity at every stage of the cold chain.

Across these models, the lesson is similar: festive capacity cannot be switched on when orders start pouring in. Seasonal workers need to be recruited, shifts planned, vehicles and line-haul secured and partner networks aligned well before the peak.

The objective is not simply to have more resources. It is to have the right resources available at the right place and at the right time.

Warehouses Become Fulfilment Engines:

If capacity determines whether a network can absorb the festive surge, warehouse design determines how quickly that capacity can be converted into fulfilled orders. The question is no longer simply how much inventory a company can store, but where it should sit, how quickly it can be picked and processed, and how efficiently it can move towards the customer.

India's major e-commerce networks are already expanding their physical footprint with this in

mind. Amazon India is investing more than INR 2,800 crore to add 20 fulfilment centres, six sortation centres and 150 last-mile stations, increasing its storage capacity by 50% to 64 million cubic feet. Seven of the new fulfilment centres and all six sortation centres are being added in non-metro cities, extending the network deeper into emerging consumption markets.

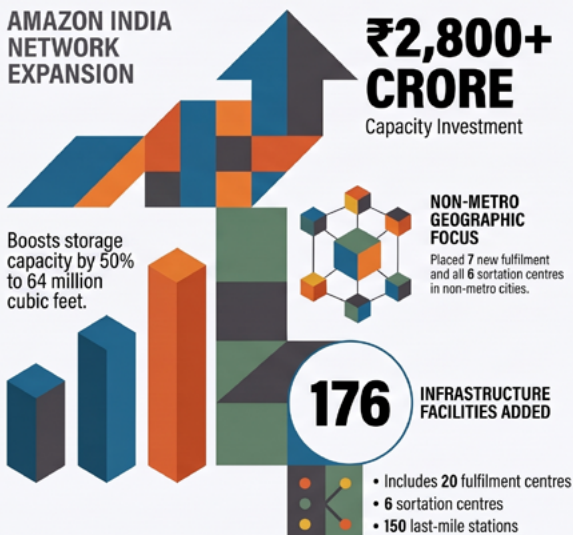
The expansion is not limited to large fulfilment centres. Amazon's new delivery stations extend coverage to 118 cities, including 12 locations receiving their first Amazon last-mile station. In Varanasi, for example, the company has added a 100,000-cubic-foot fulfilment centre and a 13,000-sq.-ft. sortation centre. Its Uttar Pradesh network now spans two fulfilment centres, five sortation centres and 170 last-mile stations.

Flipkart's logistics arm Ekart has similarly added more than 900 delivery hubs for the festive period, taking its network to more than 8,200 facilities across fulfilment centres, sortation hubs and last-mile operations.

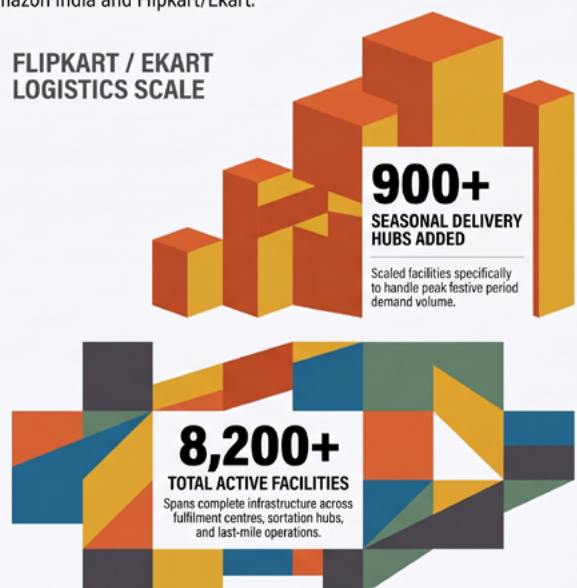
EXPANSION & SCALE: INDIAN E-COMMERCE LOGISTICS BLUEPRINT

Infrastructure expansion, storage capacity growth, and regional reach of Amazon India and Flipkart/Ekart.

AMAZON INDIA NETWORK EXPANSION



FLIPKART / EKART LOGISTICS SCALE



But the significance of this expansion goes beyond simply adding square footage. As Ketan Kulkarni, Managing Director & CEO, Allcargo Logistics, puts it, "Peak season preparedness is about how effectively logistics networks can respond to changing demand, rather than adding capacity. The focus is on getting more out of existing infrastructure through better asset utilisation, flexible capacity, workforce planning and stronger coordination across the network. As festive demand becomes more distributed across Tier II and Tier III markets, the ability to position inventory closer to consumption centres and respond quickly to changing requirements is becoming equally important."

That shift is changing the role of the warehouse.

At TCI Supply Chain Solutions, this starts with positioning inventory according to where demand is expected to emerge. Manoj Tripathi, says, "At TCI, capacity planning begins well before the festive peak. We use historical trends, customer forecasts, regional demand patterns and network intelligence to identify likely pressure points and plan resources accordingly."

The company's approach combines strategic inventory positioning with warehouse-space and throughput optimisation. TCI's managed warehousing footprint of more than 17 million sq. ft., supported by its transportation network and integrated TMS-WMS capabilities, provides the infrastructure to manage seasonal increases in volume.

But simply placing inventory closer to customers is not enough. The warehouse must also process that inventory at speed.

Anil Kumar Mishra, says, "The festive period places enormous pressure on warehouses and fulfilment centres. To manage increased



For temperature-sensitive products, peak planning is not only about moving more orders faster. It is about making sure products are available, fresh and delivered within the right temperature range—even and especially when volumes rise sharply. This year, the company increased its workforce by 15% to prepare for an anticipated 20–25% rise in demand. The additional capacity is intended to support categories such as festive gifting, sweets and confectionery, ready-to-eat foods, ice cream and healthy snacking.

Sameer Varma
Executive Director
ColdStar Logistics

volumes, companies typically increase manpower, extend operating hours, create dedicated fast-moving SKU zones and strengthen process controls to maintain accuracy. Automation, warehouse management systems and real-time performance monitoring play a major role in improving productivity while maintaining service levels."

This is where throughput becomes as important as storage capacity. A warehouse



At MOVIN, we no longer view peak surges as disruptions; our cloud-native stack and central data lake allow us to maintain always-on scalability and complete visibility. Our central control towers and tracking systems provide shipment visibility, empowering our operational teams to actively monitor shipments, anticipate bottlenecks, and execute dynamic route optimization whenever required.

Dilip Sharma
(COO) Chief Operating Officer
MOVIN Express

may have sufficient space to hold inventory, but if picking, packing, sorting or dispatch cannot keep pace with incoming orders, additional square footage does little to solve the bottleneck.

For cold-chain operators, that decision carries an additional constraint: shelf life. Sameer Varma says, "Demand may be stronger in one city and weaker in another. ColdStar's multi-

location network can help rebalance stock, but the decision is not always straightforward."

He adds, "The team must consider remaining shelf life, transfer time, availability of temperature-controlled transport, product margin, cost of handling and transfer, and whether the inventory could be sold through another channel more quickly."

For short-shelf-life products, transferring stock may not always be the most efficient answer. Operators may instead accelerate local sales, redirect inventory to another channel or adjust the next replenishment cycle. In other words, inventory positioning is not a one-time decision made before the festive season; it can change as actual demand begins to diverge from forecasts.

The same principle is driving the growth of smaller fulfilment formats, particularly in quick commerce. Amazon Now operates through more than 750 stores across more than 55 cities, with plans to expand to more than 300 cities. These smaller, strategically positioned stores depend on high-velocity inventory being placed within a much tighter radius of customers, making proximity a critical part of the delivery model.

Ultimately, the festive warehouse is becoming less of a storage point and more of a processing engine. Its value lies not in how much inventory it can hold, but in how efficiently it can turn that inventory into a picked, packed, sorted and dispatched order.

Technology: Orchestrating the Peak:

Physical capacity can absorb the festive surge, but technology determines how effectively that capacity is deployed. TMS and WMS platforms connect warehouse and transportation operations, while AI forecasting, control towers, real-time visibility and route optimisation help

operators adjust as demand changes.

For Ketan Kulkarni, the foundation is network-wide visibility. "Technology and real-time visibility are also playing a bigger role in managing this complexity. Better visibility across shipments, vehicles, warehouses and network operations allows logistics providers to identify potential bottlenecks early and make faster decisions around capacity, routing and fulfilment. The objective is not to predict every demand fluctuation perfectly, but to build the agility to respond when conditions change."

Sandiip Kothaari, focuses on what happens after an exception is identified. "Control towers are particularly valuable when they provide an integrated view across inventory, orders, transport and exceptions. However, visibility alone is insufficient. An alert must have an owner, an escalation threshold and a defined response."

He also cautions that forecasting technology has value only when it changes an operational decision. "AI-assisted forecasting can improve demand sensing, but a better forecast creates value only when it influences inventory positioning, workforce planning and capacity allocation."

For cold-chain logistics, technology must also protect the product while it moves through the network. Sameer Varma says ColdStar combines AI forecasting with warehouse and transport integration, temperature sensors, shipment visibility and route optimisation.

"The important point is that the biggest benefits do not come from AI in isolation. They come from combining better forecasts with accurate inventory data, live temperature monitoring, shipment visibility and teams that can act quickly," Sameer Varma says.

At MOVIN Express, the emphasis is on digitally orchestrating the network. Dilip Sharma, says, "Technology has fundamentally transformed how we manage festive peaks, shifting logistics from reactive surge management into a digitally orchestrated, predictive operation."

Its control towers and tracking systems provide shipment visibility, while digital tools support dynamic route optimisation when bottlenecks emerge.

At DHL Express India, technology is also being used to increase processing throughput. Manish Patel, says, "Technology has fundamentally changed how the logistics industry manages festive peaks. Earlier, planning relied heavily on historical trends and manual interventions. Today, decisions are increasingly data-driven, enabling businesses to anticipate demand fluctuations, optimise resources and respond to disruptions in real time."

Manish Patel points to DHL Express's automated sorting capabilities in Delhi, which help process higher shipment volumes with greater speed, accuracy and consistency. Combined with data-driven planning, automation allows processing capacity to scale as volumes rise.

"Looking ahead, technology is transforming festive supply-chain planning. Advanced analytics, AI-driven forecasting, control towers and end-to-end visibility platforms are helping companies identify risks earlier and make faster decisions. The future belongs to integrated supply-chain networks where manufacturers, logistics providers and customers operate on shared data, enabling higher responsiveness during high-demand periods," says, Anil Kumar Mishra.

"Ultimately, festive success is determined not by how much inventory a company holds but by how quickly and efficiently it can move products through

the supply chain while maintaining customer service, cost efficiency and operational reliability."

When Things Go Wrong

No festive plan survives the season exactly as designed. Weather can disrupt road and air networks, congestion can slow an entire corridor, demand can move beyond forecasts, and an inventory mismatch in one city can leave another market short. Failed deliveries and capacity shortages add further pressure when the network is already operating close to its limits.

Unclear accountability between multiple partners can make a local disruption difficult to manage across the full network. Reverse logistics, vendor readiness and contingency capacity also require the same attention as forward fulfilment."

This fragmentation becomes particularly visible when something goes wrong. A delay in transportation can affect warehouse schedules; an inventory mismatch can create a last-mile shortfall; and a failed delivery can add another movement to an already stretched network.

India's Logistics Ecosystem: Navigating Vulnerabilities & Peak Demand

Core Network Vulnerabilities

Structural gaps compound at partner handoffs Infrastructure maturity drops sharply outside major metros Cross-border expansion increases operational friction



Structural gaps compound at partner handoffs
Fragmented data and unclear accountability across partners escalate local disruptions into network failures.

Infrastructure maturity drops sharply outside major metros
Tier 2 and Tier 3 gateways suffer from handling constraints and dwell-time variations.

Cross-border expansion increases operational friction
Complex customs processes, freight capacity, and last-mile coordination stretch end-to-end visibility.

Strategies for Operational Resilience

Integrate digital connectivity across all network tiers Transform peak preparation into a recurring discipline Streamline regulatory and customs frameworks



Integrate digital connectivity across all network tiers
API-driven connectivity and standardized processes reduce consistency gaps between regional tiers.

Transform peak preparation into a recurring discipline
Utilize shared carrier standards, tested contingency plans, and systematic post-peak reviews.

Streamline regulatory and customs frameworks
Greater digitalization of trade processes improves cross-border shipment speed and predictability.

Yet these disruptions also reveal the adaptability that has developed across India's supply-chain ecosystem. Sandeep Kothari, says, "India's supply-chain ecosystem has considerable adaptive capacity. Its logistics providers, transport partners, warehouse operators and frontline teams regularly respond to significant variations in demand across a geographically diverse market."

The bigger weaknesses, he says, often emerge where different parts of the network meet. "The structural gaps become visible at the handoffs. Fragmented data, inconsistent service definitions, limited end-to-end visibility and

Infrastructure remains another uneven point. Dilip Sharma, says, "While major metro hubs exhibit high digital maturity, Tier 2 and Tier 3 gateways still face handling constraints and dwell-time variations, compounded by urban last-mile congestion."

For Dilip Sharma, closing this gap will require greater integration across the network, including API-driven connectivity, more standardised processes, stronger carrier relationships and workforce development. The challenge is not simply adding infrastructure, but ensuring that different tiers of the network can operate with greater consistency.

Manish Patel, India, points to another layer of complexity as logistics networks extend into emerging markets and support more cross-border trade. "Expanding reach into emerging markets requires continued investment in logistics infrastructure and network connectivity. Cross-border trade adds further complexity, with freight capacity, customs processes, warehousing coordination and last-mile delivery all requiring greater levels of planning and visibility."

Regulatory processes can add another variable. Manish Patel says, "Optimised customs procedures, streamlined compliance frameworks and greater digitalisation of trade processes can significantly improve the speed and predictability of cross-border shipments."

For large integrated networks, connectivity across air, road and international gateways provides some flexibility when individual corridors come under pressure. But the broader ecosystem still depends on how efficiently information, inventory and shipments move between multiple operators and regulatory points.

That makes the festive peak more than a test of fulfilment capacity. It exposes the points at which India's increasingly sophisticated logistics networks still lose time, visibility or accountability.

Sandiip Kothaari argues that peak preparation needs to become a recurring discipline rather than a seasonal exercise. "This means shared data standards, tested contingency plans, clear vendor accountabilities, realistic customer commitments and a formal post-peak review that converts operational experience into institutional capability."

The lesson is therefore twofold. India's supply-chain ecosystem has become significantly

more capable of absorbing demand shocks, but its performance can still vary sharply across locations, partners and network handoffs. The next stage of development lies in making those connections more consistent, so that a disruption in one part of the chain does not unnecessarily become a problem for the rest.

Beyond the Festive Season

The festive season may last a few weeks, but the capabilities built to handle it can have a much longer life. India's logistics industry is moving beyond simply adding capacity. Distributed fulfilment networks, multimodal transport, automation and digital visibility are making supply chains more responsive and better connected. At the same time, uneven infrastructure, fragmented networks and gaps across Tier II and Tier III markets show that the transformation remains uneven.

The most valuable investments are those that continue to deliver value after the festive rush. Fulfilment and sorting infrastructure can support year-round demand; transport capacity can strengthen connectivity across markets; and digital systems can improve everyday inventory, warehouse and transportation decisions.

The season also provides a real-world stress test that ordinary operations rarely replicate. Capturing those lessons and carrying them into the next planning cycle can turn temporary pressure into lasting operational improvement.

For India's logistics sector, the significance of the festive season lies not simply in how it handles a few weeks of exceptional demand, but in what it learns from them.

The demand is seasonal. The infrastructure, capabilities and lessons built around it can shape the supply chain long after the celebrations end. 