STUDY

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Online grocery delivery in Greater Cairo: fulfillment, freshness and substitution across ten platforms

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A 500-order study of ten grocery delivery platforms in Greater Cairo, comparing out-of-stock rates, delivery speed, cold-chain integrity and substitution handling, with implications for FMCG brands.

500 completed orders

10 delivery platforms

5 Greater Cairo zones

15 items in a standardized basket

Online grocery in Greater Cairo now operates through three distinct models. Quick-commerce platforms fulfill orders from enclosed dark stores built for delivery. An aggregator dispatches pickers to shop from partner stores on the customer's behalf. Supermarket chains run their own apps, drawing on the same shelves that serve walk-in shoppers. Each model makes a different promise to the consumer, and each reaches that promise through a different supply and fulfillment structure.

For consumers, the experience is judged on a few concrete outcomes: whether the basket arrives complete, whether it arrives when expected, and whether chilled, frozen and fresh items arrive in the condition they would accept in store. For brands, the same outcomes determine whether a product reaches the household as intended or is replaced, delayed or delivered below its standard. This study measured those outcomes across ten platforms using an identical 15-item basket ordered 50 times on each platform.

Inventory synchronization separates the operating models most clearly

The widest performance gap in the study lies in the share of ordered items that were missing or

substituted. The three dedicated dark-store platforms recorded out-of-stock rates between 2% and 4%, with order accuracy of 98% to 99%. Talabat Mart, which combines dark-store and mart fulfillment, sat between the models at 8% and 94%. Among supermarket apps, Gourmet Egypt performed in line with the dark stores at 6%, while the remaining chains ranged from 12% at Oscar Grand Stores to 22% at MAF Carrefour.

The difference is largely structural. A dark store holds inventory that only online orders can deplete, so the stock shown in the app closely reflects what is on the shelf. Supermarket apps list items from shelves that walk-in customers are buying from at the same time, which allows the app to accept orders for products that have already sold through in store, a pattern often described as "ghost inventory." Order accuracy follows the same pattern, since every missing item becomes a gap or a substitution in the delivered basket.

Out-of-stock rate and order accuracy by platform

| Platform | Model | Out-of-stock rate | Order accuracy | | --- | --- | --- | --- | | Rabbit | Dark store | 2% | 99% | | Breadfast | Dark store | 3% | 98% | | Voo | Dark store | 4% | 98% | | Gourmet Egypt | Supermarket app | 6% | 98% | | Talabat Mart | Dark store | 8% | 94% | | Oscar Grand Stores | Supermarket app | 12% | 94% | | Seoudi Supermarket | Supermarket app | 14% | 92% | | Spinneys Egypt | Supermarket app | 16% | 90% | | InstaShop | Aggregator | 18% | 88% | | MAF Carrefour | Supermarket app | 22% | 84% |

Source: The Consultants MEA Online Grocery Delivery Study, Greater Cairo, 2026. Base: 50 orders per platform.

Averaged by model, dark stores lead on availability and accuracy, supermarket apps come close to them on cold-chain integrity, and the aggregator records the lowest scores on all three measures.

| Model | Platforms | Out-of-stock | Order accuracy | Cold-chain integrity | | --- | --- | --- | --- | --- | | Dark stores | Rabbit, Voo, Breadfast, Talabat Mart | 4.3% | 97.3% | 91% | | Supermarket apps | Gourmet, Carrefour, Seoudi, Oscar, Spinneys | 14% | 91.6% | 89.2% | | Aggregator | InstaShop | 18% | 88% | 72% |

Unweighted averages of platform scores within each model. Talabat Mart is grouped with the dark stores.

Speed follows the same structural lines

Dark stores delivered in 17 to 38 minutes, with Rabbit the fastest at an average of 17 minutes. InstaShop averaged 58 minutes, reflecting the time pickers spend shopping the basket in store before dispatch. Supermarket apps operated on longer windows: Seoudi Supermarket delivered in 90 to 120 minutes, Oscar Grand Stores in about two hours and MAF Carrefour's express service in two to four hours, while Gourmet Egypt and Spinneys Egypt run scheduled same-day or next-day delivery.

In the dark-store model, speed and basket completeness come from the same source, a compact inventory held close to the customer. Supermarket apps trade speed for a wider assortment and, at their best, for scheduled delivery that suits planned weekly shopping.

Average delivery time by platform

| Platform | Model | Delivery time | | --- | --- | --- | | Rabbit | Dark store | 17 min | | Voo | Dark store | 24 min | | Breadfast | Dark store | 34 min | | Talabat Mart | Dark store | 38 min | | InstaShop | Aggregator | 58 min | | Seoudi Supermarket | Supermarket app | 90 to 120 min | | Oscar Grand Stores | Supermarket app | 120 min | | MAF Carrefour | Supermarket app | 2 to 4 hours (express) | | Gourmet Egypt | Supermarket app | Scheduled, same or next day | | Spinneys Egypt | Supermarket app | Scheduled, same or next day |

Source: The Consultants MEA Online Grocery Delivery Study, Greater Cairo, 2026.

Product condition depends on who handles the basket

Grocery delivery requires different handling from prepared food. Frozen items need to stay frozen, produce needs to be selected with care, and fragile items such as eggs, glass and snacks need to be packed to survive the journey. Each basket included three fresh produce items, two frozen items and several fragile items so that all three could be assessed on every order.

Gourmet Egypt led on every measure, with all frozen items arriving solid and 98% scores on produce and fragile items, supported by refrigerated delivery vehicles. Breadfast followed closely, and Rabbit, Seoudi Supermarket and Oscar Grand Stores all maintained scores of 90% or above on most measures. Seoudi and Gourmet both rely on dedicated, well-trained delivery fleets, which places them among the most dependable channels for high-value, temperature-sensitive baskets despite slower delivery.

InstaShop recorded the lowest condition scores in the study: 72% for cold-chain integrity and 68% for produce quality. The aggregator model explains much of this. Third-party pickers select produce with less consistency than trained store or warehouse staff, and frozen items are often picked early and held at ambient temperature while the rest of the 15-item basket is collected.

Freshness and cold-chain integrity by platform

| Platform | Cold chain | Produce quality | Fragile items | | --- | --- | --- | --- | | Gourmet Egypt | 100% | 98% | 98% | | Breadfast | 98% | 94% | 96% | | Rabbit | 94% | 92% | 96% | | Voo | 90% | n/a | 94% | | Seoudi Supermarket | 92% | 90% | 94% | | Oscar Grand Stores | 90% | 92% | 92% | | Talabat Mart | 82% | 76% | 84% | | Spinneys Egypt | 84% | 74% | 80% | | MAF Carrefour | 80% | 70% | 76% | | InstaShop | 72% | 68% | 74% |

Share of orders meeting each condition standard. Voo was not rated on produce because its assortment

is mostly packaged. Source: The Consultants MEA Online Grocery Delivery Study, Greater Cairo, 2026.

Substitution handling shapes satisfaction when items are unavailable

When an item cannot be supplied, the way the platform handles the gap has a strong influence on how the customer judges the order. Platforms with live inventory rarely need to substitute, and when an item is missing they credit the customer's wallet immediately. Oscar Grand Stores and Seoudi Supermarket call the customer from the store and adjust the bill on delivery, a process that involves some effort from the customer but was handled well. Talabat Mart prompts the customer in the app, with a timer that resolves the item if the customer does not respond in time.

The two models with the highest out-of-stock rates also showed the most friction. InstaShop pickers call the customer directly, often more than once, and refunds for missing items are processed manually through support chat. MAF Carrefour substituted items without asking for approval, and the replacements frequently differed from what the customer would have chosen. Refunds took 7 to 14 days as bank reversals.

Substitution protocols, customer effort and refund handling

| Platform | Substitution protocol | Customer friction | Refund for missing items | | --- | --- | --- | --- | | Breadfast | Live app inventory, rarely out of stock | Low | Instant wallet credit | | Rabbit | Live app inventory, rarely out of stock | Low | Instant wallet credit | | Talabat Mart | In-app replacement prompt, with a timer that resolves the item if unanswered | Medium | Instant wallet credit | | Oscar Grand Stores | Store calls the customer directly, handled efficiently | Medium | On-the-spot bill adjustment | | Seoudi Supermarket | Store calls the customer directly | Medium | On-the-spot bill adjustment | | InstaShop | Picker calls the customer directly, often more than once | High | Manual, via support chat | | MAF Carrefour | Substituted without customer approval | High | 7 to 14 days, bank reversal |

Source: The Consultants MEA Online Grocery Delivery Study, Greater Cairo, 2026.

> For a brand, a substitution means its own product is not in the delivered basket. When the platform chooses the replacement without the customer's input, that replacement may well be a competing product.

Implications for FMCG brands

The findings point to several options for brands planning their online grocery investment in Egypt:

1. **Consider weighting promotional activity for high-velocity lines toward dark-store platforms.** With

out-of-stock rates of 2% to 4%, these platforms are very likely to deliver what the shopper selected, so promotional spend is more likely to end in a purchase of the promoted product. On supermarket apps, a stock-out can place a substitute, sometimes a competitor's product, in the basket instead. 2. **Treat the delivery model as part of the brand experience for premium frozen and fresh lines.** A premium product that arrives thawed or bruised affects how the consumer sees the brand, whichever platform delivered it. Channels with dedicated or refrigerated fleets offer the strongest protection for these lines. Where an aggregator remains important for reach, packaging choices and pick-sequence guidance agreed with the platform may help maintain product condition. 3. **Work with supermarket partners on stock accuracy and substitution rules.** Sharing stock and replenishment data with retail partners can reduce the gap between app listings and shelf availability. Agreed substitution rules, such as offering the same brand in an alternative size first, can help keep the brand in the basket when a specific item is unavailable.

About the study

> **Platforms (10):** Quick-commerce and dark stores: Breadfast, Rabbit, Voo and Talabat Mart. Aggregator: InstaShop. Supermarket apps: MAF Carrefour, Oscar Grand Stores, Seoudi Supermarket, Spinneys Egypt and Gourmet Egypt.

> **Sample:** 500 completed orders, 50 per platform.

> **Coverage:** Ten orders per platform in each of five Greater Cairo zones: New Cairo, Maadi, Nasr City and Heliopolis, Sheikh Zayed and 6th of October, and Dokki and Zamalek.

> **Basket:** A standardized 15-item basket on every order, including three fresh produce items, two frozen items, fragile items such as eggs and glass, and ambient packaged goods.

> **Measures:** Out-of-stock and substitution handling, delivery time, produce and cold-chain integrity, and fulfillment accuracy.

> **Reporting:** Figures are synthesized from order-level observations across the full sample.

The Consultants MEA supports manufacturers, retailers and platforms with channel performance audits, mystery shopping and shopper research across Egypt and the wider region. To discuss the detailed results or a study tailored to your categories, [get in touch with our team](/#brief).