



INDUSTRY RESEARCH REPORT | 2026

# The Tech Stack Behind India's **Top 50 D2C** Beauty & Wellness Brands

A comprehensive analysis of the platforms, infrastructure, payment systems, and analytics tools powering India's fastest-growing direct-to-consumer brands.

**50**

BRANDS STUDIED

**4**

TECH DIMENSIONS

**15+**

TOOLS TRACKED

**8**

KEY OBSERVATIONS

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## OVERVIEW

# Executive Summary

We analysed the publicly detectable technology stack of 50 leading D2C beauty and wellness brands in India using BuiltWith.com. The data spans four key dimensions: e-commerce platform, hosting & CDN infrastructure, payment processing, and analytics & behavioural tracking.

Metric	Finding	Count
E-Commerce Platform	80% on Shopify	40 of 50
CDN / Infrastructure	94% use Cloudflare	47 of 50
Core Analytics	96% Google Analytics	48 of 50
Domestic Payment	66% Razorpay	33 of 50
Checkout Intelligence	60% GoKwik	30 of 50

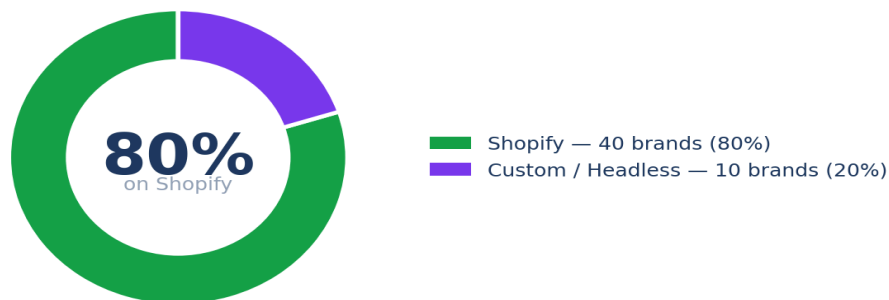
**Note on PayPal:** PayPal detected on brand sites reflects international checkout capability - not domestic Indian consumer transactions, which are dominated by Razorpay via UPI, cards, and wallets.

## 01 — E-COMMERCE PLATFORM

# Shopify Rules the D2C Landscape

The choice of e-commerce platform is the most foundational technology decision a brand makes. It determines developer ecosystem, app availability, checkout flexibility, and total cost of ownership.

## E-Commerce Platform Distribution



Platform	Count	Share	Notable Brands
Shopify	40	80%	The Derma Co, Minimalist, mCaffeine, Pilgrim, Plum Goodness, Dot & Key, Traya, Sugar Cosmetics, Lakme, and 31 others
Custom / Headless	10	20%	Mamaearth, WOW Skin Science, Man Matters, Himalaya, Forest Essentials, Kama Ayurveda, Foxtale, Ustraa, Nat Habit, Urvija

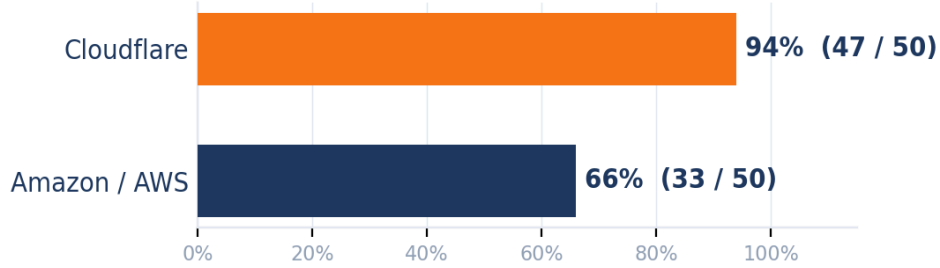
**40 of 50 brands use Shopify.** The 10 on custom stacks are typically larger-revenue businesses with legacy systems or dedicated engineering teams.

## 02 — HOSTING & CDN INFRASTRUCTURE

# Cloudflare + AWS: The Dominant Infra Duo

Cloudflare functions as CDN, DDoS protection, and edge security - often layered on top of Shopify or AWS-hosted infrastructure. BuiltWith detects these as separate layers.

## Infrastructure & CDN Adoption

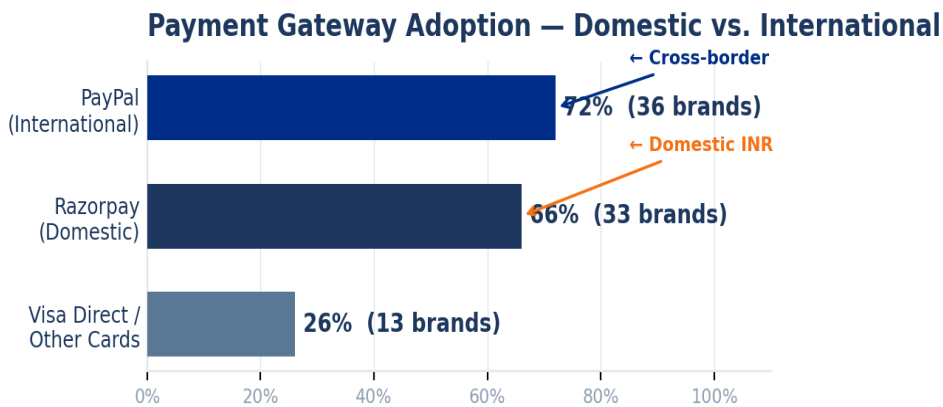


**Shopify + Cloudflare combo:** 39 of 50 brands (78%) run both simultaneously. Only 3 brands operate without Cloudflare. This is the default infrastructure starting point.

### 03 — PAYMENT GATEWAYS

## Razorpay Dominates Domestic; PayPal = International Readiness

The critical distinction: Razorpay handles domestic INR transactions (UPI, cards, wallets, EMI). PayPal's 72% presence reflects international currency capability - not primary Indian consumer payment behaviour.



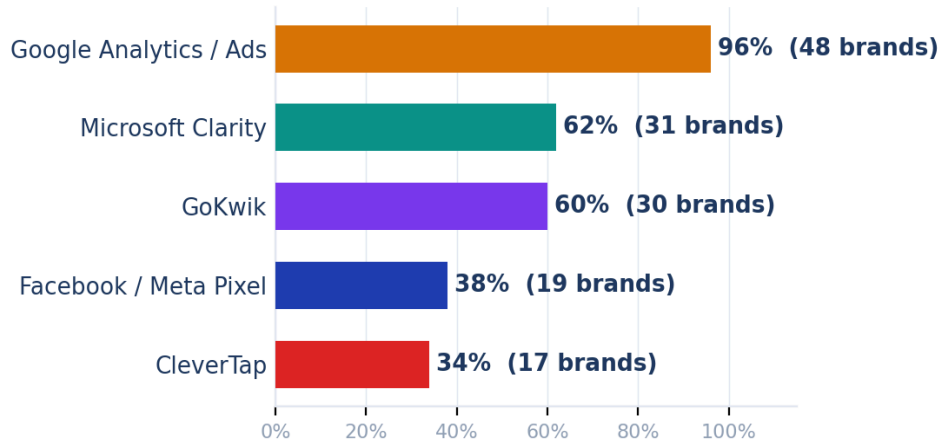
**Understanding PayPal:** For domestic-only plays, Razorpay's 66% is the real benchmark. Both can be live within hours on Shopify - enable both from Day 1.

### 04 — ANALYTICS & TRACKING STACK

## Five Tools That Power D2C Intelligence

Analytics is where D2C brands diverge most in sophistication. Five tools form the standard intelligence stack.

## Analytics & Tracking Tool Adoption



Tool	Category	Count	Adoption	Primary Use
Google Analytics / Ads	Traffic & Acquisition	48	96%	GA4 for traffic/funnel; Google Ads for paid acquisition
Microsoft Clarity	UX Intelligence	31	62%	Free session recordings, heatmaps, rage-click detection
GoKwik	Checkout Optimisation	30	60%	Reduce RTO, convert COD to prepaid, smart checkout
Facebook / Meta Pixel	Paid Social	19	38%	Meta ad tracking (understated due to server-side CAPI)
CleverTap	Retention Marketing	17	34%	Push, email journeys, RFM segmentation, lifecycle CRM

## Analytics Stack Complexity – How Many Tools Brands Deploy



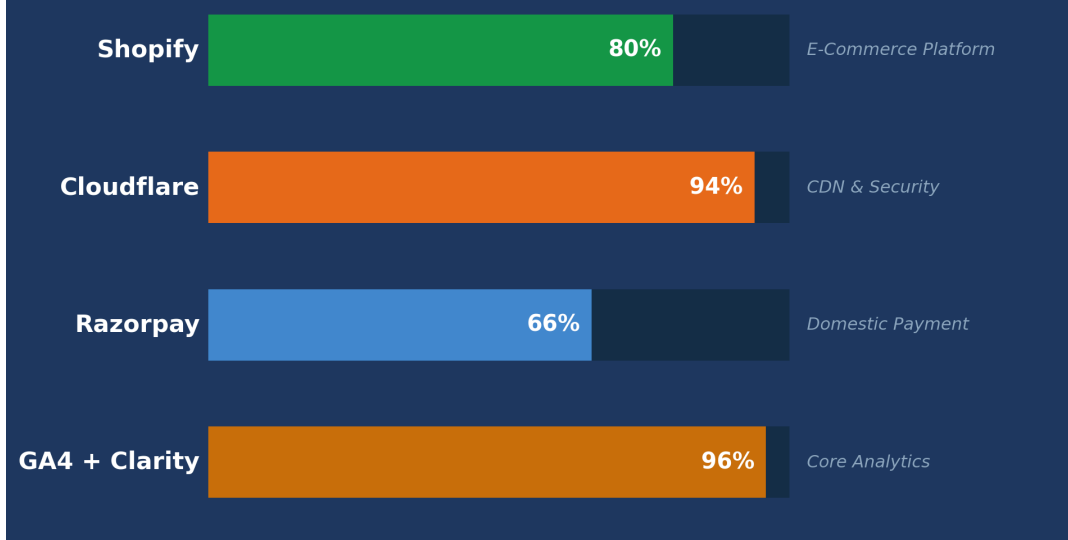
**70% of brands** run 3 or more analytics tools simultaneously. The standard advanced stack is: GA + Clarity + GoKwik + CleverTap.

### 05 — THE DOMINANT STACK

## The Default Indian D2C Technology Combination in 2026

Across all four dimensions, a clear standard stack has emerged - validated by 60-96% of the top 50 brands.

## The Default Indian D2C Tech Stack — 2026



Layer	Tool	Adoption	When to Add
Platform	Shopify	80%	Day 1
CDN / Security	Cloudflare	94%	Day 1 - free tier
Domestic Payment	Razorpay	66%	Day 1
International Payment	PayPal	72%	Day 1 - zero effort
Traffic Analytics	Google Analytics 4	96%	Day 1 - free
UX Intelligence	Microsoft Clarity	62%	Day 1 - free
Checkout Optimisation	GoKwik	60%	When COD is significant
Retention Marketing	CleverTap	34%	When retention is the key lever

### 06 — KEY OBSERVATIONS

## What This Data Tells New D2C Brands

### 01 PLATFORM STRATEGY

#### Start on Shopify. Move to custom only when it becomes a demonstrable constraint.

80% of India's top brands use Shopify. The 10 on custom stacks are typically 8-15 year legacy businesses with strong engineering teams. For a new entrant, Shopify's app marketplace, GoKwik/CleverTap integrations, and developer ecosystem mean dramatically lower time-to-market and total cost of ownership.

### 02 INFRASTRUCTURE

#### Cloudflare is non-negotiable - and essentially free to start with.

94% adoption. Cloudflare's free/Pro tier provides CDN, DDoS protection, and edge performance without meaningful cost at D2C traffic volumes. Skipping it means slower load times, greater bot exposure, and no edge caching - all of which directly hurt conversion rates and Google Core Web Vitals scores.

### 03 PAYMENT GATEWAY

#### Razorpay for INR; enable PayPal for international - set up both from Day 1.

Razorpay covers UPI, Net Banking, wallets, and card EMI - everything Indian consumers expect. PayPal costs nothing to enable on Shopify and unlocks international buyers including the significant NRI market. Both can be live within hours of store launch.

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## 04 CHECKOUT OPTIMISATION

### **GoKwik is the secret weapon for Indian D2C unit economics.**

60% adoption. GoKwik reduces RTO (which can run at 30-40% without intervention) and improves prepaid order conversion. For any brand with significant COD share or Tier 2+ delivery volume, GoKwik should be treated as core infrastructure.

## 05 ANALYTICS

### **Microsoft Clarity is the highest-ROI free tool in the entire stack.**

62% adoption. Session recordings, heatmaps, and rage-click detection at zero cost. The GA4 + Clarity combination gives any brand a complete traffic + UX intelligence layer without spending a rupee.

## 06 RETENTION MARKETING

### **CleverTap signals maturity. Adopt it when repeat purchase becomes the growth lever.**

34% adoption, concentrated in brands with subscription models. The right trigger: when CAC is rising, repeat purchase rate is below 30%, and you have enough customer data for meaningful cohort analysis.

## 07 META PIXEL

### **38% Pixel detection understates actual Meta advertising activity.**

iOS 14+ changes pushed brands toward Meta's Conversions API (CAPI) - server-side tracking that BuiltWith cannot detect. Don't interpret the 38% as declining Meta channel usage; the implementation methodology has simply shifted.

## 08 SCALE INDICATOR

### **Analytics stack complexity correlates with brand revenue maturity.**

Brands with 4+ tools (28%) are almost uniformly higher-revenue established names. The progression is clear: start with free tools, add GoKwik when COD matters, add CleverTap when retention becomes the primary growth target.

## All 50 Brands — Full Tech Stack

Complete dataset as detected via BuiltWith.com. PayPal classified as International Capability throughout.

#	Brand	Platform	Domestic	Intl.	Analytics Tools
1	Mamaearth	Custom	—	—	Google Analytics
2	The Derma Co	Shopify	Razorpay	PayPal	GA, Clarity
3	Minimalist	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap, GoKwik
4	Dot & Key	Shopify	Razorpay	—	GA, Clarity
5	Plum Goodness	Shopify	Razorpay	PayPal	GA, Clarity
6	mCaffeine	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap, GoKwik
7	Pilgrim India	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap
8	Foxtale	Custom	—	—	Google Analytics
9	Re'equil	Shopify	Razorpay	PayPal	GA, CleverTap, GoKwik
10	Deconstruct	Shopify	—	PayPal	GA, Clarity, GoKwik
11	Aqualogica	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap, GoKwik
12	Skinkraft	Shopify	Razorpay	—	GA, CleverTap, GoKwik
13	Vedix	Shopify	—	—	GA, CleverTap, GoKwik
14	Clensta	Shopify	Razorpay	PayPal	Google Analytics
15	Bombay Shaving Co.	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
16	Beardo	Shopify	—	PayPal	GA, Clarity, CleverTap, GoKwik
17	Man Matters	Custom	—	—	GA, CleverTap
18	Ustraa	Custom	—	—	Google Analytics
19	Bella Vita Organic	Shopify	Razorpay	PayPal	GA, CleverTap, GoKwik
20	Arata	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
21	WOW Skin Science	Custom	—	—	GA, Clarity
22	Juicy Chemistry	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
23	Wellbeing Nutrition	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap
24	Traya	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
25	Tvam	Shopify	Razorpay	PayPal	Meta Pixel
26	Biotique	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
27	The Moms Co	Shopify	—	—	GA, GoKwik
28	OZiva	Shopify	Razorpay	PayPal	GA, Clarity
29	Conscious Chemist	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap, GoKwik
30	Nat Habit	Custom	—	—	GA, Clarity, CleverTap, GoKwik
31	Sugar Cosmetics	Shopify	Razorpay	—	GA, Clarity, GoKwik
32	Renee Cosmetics	Shopify	—	PayPal	GA, CleverTap
33	Swiss Beauty	Shopify	Razorpay	PayPal	GA, CleverTap, GoKwik
34	Mars Cosmetics	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
35	Forest Essentials	Custom	—	PayPal	Google Analytics
36	Kama Ayurveda	Custom	—	—	Google Analytics
37	Khadi Natural	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
38	Colorbar	Shopify	—	PayPal	Microsoft Clarity
39	Lakme	Shopify	Razorpay	PayPal	GA, Clarity

40	<b>Lotus Herbals</b>	Shopify	Razorpay	PayPal	GA, CleverTap, GoKwik
41	<b>Himalaya</b>	Custom	—	—	Google Analytics
42	<b>Soulflower</b>	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
43	<b>Bare Necessities</b>	Shopify	Razorpay	PayPal	GA, Clarity
44	<b>Fixderma</b>	Shopify	Razorpay	PayPal	GA, GoKwik
45	<b>Earth Rhythm</b>	Shopify	—	PayPal	GA, GoKwik
46	<b>Just Herbs</b>	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
47	<b>Anveya</b>	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
48	<b>Brillare</b>	Shopify	Razorpay	PayPal	GA, Clarity, GoKwik
49	<b>Bblunt / Amrutam</b>	Shopify	Razorpay	PayPal	GA, Clarity, CleverTap, GoKwik
50	<b>Urvija</b>	Custom	—	—	GA, Clarity, GoKwik

## Ready to Launch or Scale Your D2C Brand Online?

This research covers what the top 50 brands use. The harder question is: which tools are right for your brand, your budget, and your growth stage - and how do you get them working together from day one?

Eiosys is a Mumbai-based boutique technology company with 16 years of experience building websites, e-commerce stores, and custom digital platforms for Indian businesses. We work across Shopify and custom builds. Every project is director-led, with no junior handoffs and no outsourcing.

### Website Development - Custom Websites & E-Commerce Platforms

WordPress, custom builds, and full-stack web development for D2C brands that need performance and flexibility beyond out-of-the-box themes.

<https://www.eiosys.com/services/website-development-company/>

### Shopify Development - Shopify Stores Built for Indian D2C

Theme development, custom Shopify apps, GoKwik & Razorpay integration, and ongoing Shopify store management.

<https://www.eiosys.com/services/shopify-development-services/>

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### About This Research

Conducted by Aakash Gupta (SEO Intern), supervised by Aris Shaikh (Website Vertical Head) at Eiosys Private Limited. Data sourced via BuiltWith.com. Technology detection is based on frontend signals and may not capture server-side tools. Published 2026.

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