

India Foodservice - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The India Foodservice Market size is estimated at USD 77.54 billion in 2024, and is expected to reach USD 125.06 billion by 2029, growing at a CAGR of 10.03% during the forecast period (2024-2029).

Increased willingness of people to experiment with new cuisines and dining experiences propelling the market sales

- India is a diverse country with a rich culinary heritage, and people are increasingly willing to experiment with new cuisines and dining experiences. This has led to the growth of specialized restaurants offering unique and innovative dining experiences. Apart from Indian cuisine, other cuisines, such as Lebanese, Chinese, and Japanese, are popular in India. The number of sushi orders increased by 50% from 2019 to 2021. The growing popularity of eating out, changing lifestyles, and increased urbanization are driving the growth of the foodservice market in India. More than 45 million Indians preferred eating out at restaurants in 2021.

- As of 2022, around 24% of the Indian population was vegetarian, and around 9% was vegan. Hence, foodservice players are offering vegan menus to cater to the vegetarian and vegan populations in India. Many quick service restaurants are adapting to this trend and offering vegan menus. For instance, Burger King, Pizza Hut, Taco Bell, and KFC offer vegan dishes.

- The growth of cloud kitchens in India is mainly due to the increasing demand for food delivery services, driven by factors such as busy lifestyles, convenience, and the COVID-19 pandemic. Another factor driving the growth of cloud kitchens in India is the rise of digital platforms for food ordering and delivery, such as Swiggy and Zomato. These platforms provide a convenient way for customers to discover and order from a wide range of cloud kitchen options and for cloud kitchens to reach a large customer base without extensive marketing and advertising. Hence, cloud kitchens are anticipated to register the fastest growth during the forecast period, with a CAGR of 16.67%, by value.

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India Foodservice Market Trends

Cafes and bars in India continue to grow in popularity, driven by rising disposable incomes and demand for socialization

- From 2017 to 2022, the number of quick service restaurants increased, registering a CAGR of 0.20%. An influx of the young population drives the market. Young adults (18-35 years) enjoy eating out and even consider fast food to be delectable, and they spend a significant amount of their income on it. Teenagers from upper-income families are spending 24% of their cash on food. People in this age range are ideal customers for the QSR chains, which makes the growth of this segment more significant. In India, more than 50% of the population is under 25 years and more than 65% is under 35 years. Quick service chains, such as McDonald's, Burger King, and Domino's, deepen their reach in India's smaller cities, benefiting from a younger demographic.
- Cloud kitchen outlets are the fastest-growing, and the sub-segment is projected to register a CAGR of 6.10% during the forecast period. Cloud kitchens rely entirely on technology to serve their customers. Cloud kitchens have been quite successful in implementing customer feedback technology. The growth of Indian food tech, especially the cloud kitchens in India, has been tremendous, with the growth of giants like Zomato and Swiggy. Zomato registered a high of 7,100 orders per minute, and Swiggy crossed 9,000 orders per minute.
- The cafes and bars sub-segment held the major share of the market, at 48%, in 2022. In India, Bangalore has more than 800 bars and clubs that provide alcohol. The rise in the number of IT businesses has helped the younger generation hold more disposable income, which has ultimately increased demand for India's pub and bar cultures. The majority of customers prefer to visit businesses that serve both food and alcohol. People are drawn to the ambiance of cafes and bars, making socializing easier for customers.

Chef-driven full service restaurants in India leverage technology to improve efficiency and profitability

- In India, the average orders were observed to be highest among full service restaurants in 2022 compared to other foodservice types, with a price of USD 6.03. Chef-driven dining-out restaurants are on the rise as more and more professionally trained chefs and celebrity chefs are now focusing on benefiting from the growth provided by FSRs. Many full service restaurants in India are adopting kitchen automation technologies, such as kitchen display systems, order management systems, and inventory management systems. These technologies help streamline the time it takes to prepare meals and improve overall efficiency.
- An increase in demand for online meal delivery is driving the expansion of the cloud kitchen sub-segment. Indians spent an average of USD 4.70 per order on takeaway food delivery in 2022. Online meal ordering and delivery services grew in popularity after the pandemic. Online food delivery platforms such as Swiggy, Zomato, and Uber Eats have played a significant role in the growth of the industry. Popular dishes offered by cloud kitchens in India are Jeera Rice and Paratha, both priced at an average of USD 1.51 per 300 grams. In 2022, the cost of their most popular dishes was fixed at 50% of the average order value. Asian cuisine held more than 50% of the market share in India in 2022. The demand for full service restaurants is expected to increase due to changes in consumer behavior and demand for local cuisines. Consumers, at present, are looking for innovation in food and technology. Indian food is characterized mainly by dishes like Paneer Butter Masala and Biryani. In 2021, Indians ordered 115 biryanis per minute. Thus, FSRs offer Indian cuisines, and the average price of Indian curries was USD 3.9 per 300 grams in 2022.

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India Foodservice Industry Overview

The India Foodservice Market is fragmented, with the top five companies occupying 1.83%. The major players in this market are Doctor's Associate, Inc., Gujarat Cooperative Milk Marketing Federation, Jubilant FoodWorks Limited, McDonald's Corporation and Yum! Brands, Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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