

**India Food Services Market, By Market Type (Organized, Unorganized), By Type (Dining Service (Hotels, Restaurants), QSR (Quick Service Restaurants), PBCL (Pubs, Bars, Clubs and Lounges), Others (Cafeteria, Cloud Kitchen, Catering and Vending)), By Ownership (Standalone Outlets, Chained Outlets), By Brands (Domestic, International), By Region, Competition Forecast & Opportunities, 2020-2030F**

Market Report | 2025-02-17 | 85 pages | TechSci Research

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**Report description:**

The India Food Services Market was valued at USD 48.90 Billion in 2024 and is expected to reach USD 93.26 Billion by 2030 with a CAGR of 11.42% during the forecast period. The Indian foodservice market is undergoing a significant transformation due to changing consumer preferences and dietary habits. By 2022, around 24% of the Indian population identified as vegetarian and 9% as vegan, encouraging major food service brands to expand their plant-based menu options. This shift in dietary choices has sparked the rise of specialized restaurants and menu innovations across various food service segments. The India food service market is a vibrant and rapidly evolving industry that plays a pivotal role in the country's culinary landscape. This sector encompasses a wide range of establishments, from traditional street vendors to upscale fine-dining restaurants, and caters to the diverse tastes and preferences of India's vast and dynamic population. This overview provides a comprehensive insight into the key aspects of the India food service market.

**Key Market Drivers**

**Changing Consumer Preferences and Lifestyles**

The transformation in consumer lifestyles is a key driver of India's food services market. Rapid urbanization, growing disposable incomes, and the increasing influence of global food trends have resulted in a major shift in the way people in India approach food consumption. As urban centers expand, more people are adopting modern and busy lifestyles, leading to a higher demand for convenience. Dining out, ordering food online, and opting for fast-casual and quick-service restaurants (QSRs) have become popular choices among young professionals and millennials, who prefer eating outside or ordering food due to time constraints.

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The changing eating habits are also reflected in the growing preference for global cuisines, including Italian, Chinese, and Mediterranean, along with more personalized and varied options such as plant-based, organic, and health-conscious food. Furthermore, with increasing health awareness, consumers are increasingly opting for nutritious food alternatives and fresh ingredients, leading food service providers to diversify their offerings. As a result, many restaurants and food service chains have begun to introduce specialized menus such as vegan, gluten-free, and low-calorie options to cater to evolving consumer preferences.

#### Growth of Digital Platforms and Online Food Delivery

Another key driver for India's food services market is the growing reliance on digital platforms and the increasing popularity of online food delivery services. The rise of food delivery platforms like Zomato, Swiggy, UberEats, and Dunzo has revolutionized the way consumers access food. Internet penetration in India is growing steadily, with smartphones becoming a primary mode of communication, entertainment, and even shopping. With food delivery apps offering a variety of dining options and easy access to restaurant menus, consumers can now order food from their favorite places with just a few taps. Online food delivery has especially gained momentum in urban and semi-urban areas where people have hectic work schedules and limited time to cook. The convenience of having food delivered to one's doorstep has made food delivery a preferred choice for a growing number of consumers. Additionally, platforms are introducing unique features such as real-time tracking, multiple payment options, and personalized recommendations based on user preferences, which are improving the overall customer experience. Swiggy has introduced the Snacc app in Bengaluru, providing fast food delivery within 10-15 minutes. The rapid food delivery sector has become more competitive with new services from established players like Zomato and startups such as Blinkit and Zepto Cafe entering the market.

#### Expansion of International and Regional Food Chains

The expansion of both international and regional food chains is a significant contributor to the rapid growth of the Indian food services market. India, with its large population and rapidly expanding middle class, offers a huge opportunity for both global food brands and local businesses to tap into an increasingly affluent and diverse consumer base. International chains like McDonald's, KFC, Domino's, Starbucks, and Burger King have expanded their presence in cities across India, often localizing their menus to cater to regional tastes. These global brands benefit from the familiarity and recognition that come with established brands, which resonate with Indian consumers who may be seeking international dining experiences. In addition to international brands, regional food chains that offer authentic Indian cuisine are gaining significant traction. Local food chains have a deep understanding of Indian tastes and preferences, which allows them to cater to diverse regional palates while offering competitive pricing. These chains are capitalizing on the preference for traditional Indian foods, such as biryanis, dosas, and street food-inspired dishes, by standardizing and offering them in convenient, branded formats. This has led to the expansion of both casual dining restaurants and QSRs focused on regional flavors. The entry of both international and local brands into the market continues to fuel expansion and strengthens the overall food services landscape in India.

#### Key Market Challenges

##### Intense Competition and Market Saturation

The India food services market faces intense competition, particularly in urban centers where numerous players ranging from international fast-food chains to local restaurants compete for market share. This saturation creates pressure on food service operators to differentiate themselves through innovative offerings, superior service, and value for money. As established brands expand rapidly and new entrants continue to emerge, companies must invest heavily in marketing, branding, and customer loyalty programs to stand out. Additionally, with online food delivery services becoming ubiquitous, local restaurants face the challenge of competing with large-scale cloud kitchens and food delivery platforms that often have more extensive delivery networks and better economies of scale. This intense competition drives down profit margins, making it harder for smaller or newer businesses to establish a foothold.

##### High Operational Costs and Profitability Concerns

Another significant challenge facing India's food services market is the high operational costs, which can erode profitability. These costs include rent, labor, food sourcing, logistics, and technology investments (especially for online food delivery). In cities like Mumbai, Delhi, and Bengaluru, rental costs for restaurant spaces are extremely high, and maintaining a consistent supply of quality ingredients can also be costly, especially with fluctuating commodity prices. The labor market in the food services sector

can be challenging too, with staff turnover being high, leading to additional recruitment and training expenses. Moreover, with food delivery apps charging commissions and fees, food service businesses must manage these costs while remaining competitive in pricing. For restaurants, the balance between offering quality food at affordable prices while maintaining profitability can be difficult. Operational inefficiencies or failure to streamline processes can also lead to financial strain. These high costs, coupled with pressure to offer discounts and promotions, make it challenging for businesses to maintain healthy profit margins, especially for smaller or newer entrants.

#### Key Market Trends

##### Rise of Online Food Delivery and Cloud Kitchens

One of the most significant trends in the India food services market is the rapid rise of online food delivery and the expansion of cloud kitchens. Online food delivery platforms like Zomato, Swiggy, and UberEats have become integral to the food service ecosystem, providing consumers with convenience and a wide variety of dining options at their fingertips. This trend has been particularly accelerated by the COVID-19 pandemic, which heightened the demand for home delivery due to safety concerns. Cloud kitchens, which are kitchen-only setups without a dine-in facility, have emerged as an efficient way for businesses to cater to the growing demand for delivery-only services. These kitchens operate on a delivery-first model, reducing overhead costs related to renting physical storefronts, while focusing on optimizing their food production and delivery processes. The convenience of ordering food via smartphones, along with fast delivery services, has made online food ordering a mainstream option for consumers, particularly in urban areas. As a result, more traditional restaurants are also shifting toward or incorporating online delivery services, and new brands are emerging with a digital-first strategy, contributing to the sector's overall growth.

##### Increasing Demand for Health-Conscious and Sustainable Food Options

Health-conscious eating is increasingly shaping the food services market in India. As more consumers become aware of the long-term benefits of healthier diets, there is a growing demand for nutritious, organic, and sustainable food choices. Consumers are opting for plant-based, gluten-free, and low-calorie meals as part of their efforts to maintain better health and combat lifestyle diseases. This trend is particularly prominent among millennials and Gen Z, who are more health-aware and willing to pay a premium for nutritious food. Restaurants and food chains are responding by offering menus that focus on wholesome, organic ingredients and by incorporating superfoods, such as quinoa, chia seeds, and kale, into their dishes. Vegan and vegetarian food options are also seeing a surge in demand, driven by concerns related to animal welfare and environmental sustainability. McDonald's India has partnered with CSIR-CFTRI to launch burgers featuring a multi-millet bun, sourced directly from farmers, aimed at enhancing nutritional value and providing a distinct dining experience. This collaboration is the first of its kind in the QSR sector, blending CSIR-CFTRI's expertise with McDonald's commitment to creating healthier food options, underscoring their dedication to innovation in this area.

##### Digitalization and Technology Integration

The digital transformation of the food services market in India is another prominent trend, as technology is increasingly being integrated into operations to enhance customer experience and optimize business processes. The adoption of digital ordering systems, self-service kiosks, and mobile apps has streamlined the way consumers interact with food service businesses, providing them with more convenience and customization options. Many restaurants are now offering contactless payment methods, online reservations, and real-time order tracking, improving customer convenience and satisfaction. Additionally, the use of data analytics and artificial intelligence (AI) is helping food service businesses better understand customer preferences, streamline inventory management, and predict demand patterns. With the rise of delivery-only cloud kitchens, operators are leveraging technology to manage multiple brands under one roof and to optimize kitchen operations for speed and efficiency. Robotics and automation are also gaining traction, with some restaurants introducing automated cooking and food delivery systems to reduce human intervention and improve consistency in food preparation.

#### Segmental Insights

##### Ownership Insights

Chained outlets was the dominant segment in the India food services market, driven by their scalability, brand recognition, and consistency in offering. These outlets, which include international fast-food chains like McDonald's, KFC, Subway, and Starbucks, as well as successful Indian chains like Domino's and Bikanervala, are expanding rapidly across urban and tier-2/tier-3 cities. The rise of chained outlets is fueled by their ability to standardize operations, ensuring consistent food quality and customer

experience. This has made them attractive to consumers who seek reliable and familiar dining options. The appeal of chained outlets lies in their established business models, which benefit from economies of scale, robust supply chains, and brand loyalty. They are able to offer competitive pricing, widespread availability, and efficient service, all of which attract a large customer base. Moreover, these chains are continuously evolving their menus to cater to local tastes while maintaining the core offerings that their brand is known for. With a focus on expanding delivery and takeout services, especially through partnerships with online delivery platforms, chained outlets are well-positioned to meet the growing demand for convenience in the food services market.

#### Regional Insights

The North region of India, encompassing key cities like Delhi, Gurugram, Chandigarh, and Amritsar, has emerged as the dominant region in the food services market due to several favorable factors. A significant driver of this dominance is the high urbanization rate and the increasing disposable income among the region's consumers. With a large and diverse population, the North region offers a vast market for both domestic and international food chains to expand, including QSRs (Quick Service Restaurants), casual dining, and fine dining outlets. The region's metropolitan cities like Delhi and Gurugram attract a cosmopolitan population with diverse tastes, resulting in a growing demand for a wide range of cuisines, from fast food to ethnic and international options. This demand has led to the proliferation of chained outlets, cloud kitchens, and food delivery services in the region. Additionally, the increasing penetration of digital platforms for food delivery, such as Zomato and Swiggy, has further fueled the region's food service industry, as consumers prefer the convenience of home delivery. Moreover, the North region benefits from the thriving business and tourist sectors, which continually drive demand for dining out and catering services. As a result, the region continues to dominate the India food services market, with robust growth in both dining and delivery services.

#### Key Market Players

- Jubilant Foodworks Ltd
- McDonald's India Private Limited
- Haldiram Snacks Private Limited
- Devyani International Limited
- Burger King India Limited
- Barbeque-Nation Hospitality Limited
- Coffee Day Enterprises Limited
- Tata Starbucks Private Limited
- Bikanervala Foods Private Limited (BFPL)
- Subway Systems India Private Limited

#### Report Scope:

In this report, the India Food Services Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

##### □□ India Food Services Market, By Market Type:

- o Organized
- o Unorganized

##### □□ India Food Services Market, By Type:

- o Dining Service (Hotels, Restaurants)
- o QSR (Quick Service Restaurants)
- o PBCL (Pubs, Bars, Clubs and Lounges)
- o Others (Cafeteria, Cloud Kitchen, Catering and Vending)

##### □□ India Food Services Market, By Ownership:

- o Standalone Outlets
- o Chained Outlets

##### □□ India Food Services Market, By Brands:

- o Domestic
- o International

##### □□ India Food Services Market, By Region:

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- o North
- o West
- o South
- o East

#### Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Food Services Market.

#### Available Customizations:

India Food Services Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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