

India Online Food Delivery Market Growth Analysis - Market Size, Share, Forecast Trends and Outlook Report (2025-2034)

Market Report | 2025-08-13 | 143 pages | EMR Inc.

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Report description:

The India online food delivery market size attained a value of USD 48.07 Billion in 2024 . The industry is expected to grow at a CAGR of 27.30% during the forecast period of 2025-2034. By 2034, the market is expected to reach USD 537.23 Billion .

The growth of the India online food delivery market has been driven by increased convenience, variety, and time-saving benefits. Consumers can explore a wide range of cuisines with ease, without the need to visit restaurants. Platforms operate 24/7, offering access to meals at any time and highlighting local delicacies. In March 2024, Zomato introduced 'Pure Veg Mode' and 'Pure Veg Fleet' to cater specifically to vegetarian customers, ensuring food preparation and handling meet their dietary requirements.

Online food delivery platforms provide several advantages, such as convenient payment methods, promotions, and discounts, enhancing affordability and impacting the India online food delivery market revenue. Customisation options allow users to personalise orders, while reviews help with informed choices. Cashless payments improve safety and hygiene, benefiting both businesses and consumers.

The growth of online food delivery platforms enables restaurants to expand without heavy investments in delivery infrastructure. These platforms help businesses reach a wider audience, enhance brand visibility, and create jobs for delivery staff, thereby boosting demand for the India online food delivery market. They also offer real-time order tracking and festive discounts to attract more customers. In October 2023, Curefoods, backed by Accel and Chiratae Ventures, acquired Yumlane Pizza, a cloud kitchen brand with cutting-edge pizza technology. This acquisition strengthens Curefoods' market presence by leveraging Yumlane's network, allowing the company to expand its brand portfolio, including EatFit and Nomad Pizza, in the foodtech industry.

Key Trends and Recent Developments

January 2025

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Swiggy launched the SNACC app offering quick meals, beverages, and snacks delivered in 15 minutes. This move came as part of the growing competition in India's rapid food delivery space, with rivals like Zomato and Blinkit also entering the 15-minute delivery market. SNACC started in Bengaluru, with plans for future expansion.

October 2024

Swiggy launched its 10-minute food delivery service, Bolt, on 7th October 2024 in six cities, including Hyderabad, Mumbai, and Delhi. Offering quick-to-prepare meals from popular brands like KFC and McDonald's, Bolt caters to a 2 km radius while maintaining food quality. Swiggy plans future expansion of the service.

February 2024

Domino's Pizza, operated by Jubilant FoodWorks Ltd in India, joined the Open Network for Digital Commerce (ONDC). Its catalogue is now accessible across various apps, enabling seamless purchases. Customers in Delhi NCR can already order via ONDC, with plans for expansion to other cities soon.

January 2024

Rebel Foods joined the Open Network for Digital Commerce (ONDC), enhancing its pan-India D2C presence. Customers can now order from nine Rebel Foods brands, including Behrouz Biryani, Faasos, and Wendy's, via ONDC. This move aligns with the company's goal to expand its customer delivery experience.

Increasing Adoption of Online Food Delivery is Boosting India Online Food Delivery Market Growth

The India online food delivery market is witnessing significant growth, driven by the rising use of smartphones, internet connectivity, and digital payment systems. Consumers are increasingly choosing the convenience of online food orders, spurring a surge in demand across urban and semi-urban areas. In December 2024, WAAYU, India's first zero-commission food delivery platform, expanded to 25 cities. Supported by ONDC, WAAYU empowers local restaurants by providing affordable, high-quality meals and aims to onboard 100,000 restaurants within three years, targeting 30% of the country's market.

Expansion of Cloud Kitchens is Increasing Opportunities in the India Online Food Delivery Market

Cloud kitchens, or ghost kitchens, have become a key trend in India online food delivery market. Operating without physical dining spaces, they focus solely on fulfilling online orders, allowing restaurants to expand with reduced costs and greater flexibility. In October 2024, Karigari by Chef Harpal Singh Sokhi opened its first cloud kitchen in Noida, marking the brand's 11th outlet. This model supports the brand's expansion into Tier I and II cities, offering a modern twist on traditional North Indian dishes, and providing a seamless delivery experience.

AI and Data Analytics Integration is Driving the Growth of the India Online Food Delivery Market

The integration of artificial intelligence (AI) and data analytics is increasingly shaping India online food delivery market. These technologies enable platforms to offer personalised recommendations, optimise delivery routes, predict customer preferences, and streamline inventory management. Zomato incorporated generative AI through Microsoft Azure to enhance user experiences. Vaibhav Bhutani, head of generative AI, focuses on developing AI-driven systems like multi-agent systems and Zomato AI Buddy, a virtual assistant tailored to individual preferences, improving engagement and food delivery accuracy.

Growing Demand for Health-Conscious and Sustainable Choices is a Key Trend in the India Online Food Delivery Market

With increasing consumer awareness of health and sustainability, food delivery platforms in India are broadening their menus to feature healthy, organic, and plant-based meals. Additionally, eco-friendly packaging and sustainability-driven initiatives are gaining momentum. Zomato, set an ambitious 2030 goals, including 100% EV deliveries by 2033 and 100 million plastic-free orders by 2025. It also plans to reduce food waste, support 300,000 small businesses, empower one million gig workers, and achieve 50% diversity representation, contributing to both inclusive growth and sustainability in the sector.

India Online Food Delivery Industry Segmentation

The EMR's report titled "India Online Food Delivery Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Cuisine

- Indian
- Chinese
- Italian
- Others

Key Insight: Indian cuisine dominates the India online food delivery market, with a diverse range of dishes satisfying various regional tastes. The increasing preference for traditional flavors and regional specialties like biryani, curries, and snacks has led to a surge in demand for Indian cuisine delivery services. Delivery platforms are capitalising on this by offering a wide range of regional foods, making it a highly relevant segment in India's food delivery ecosystem. Rebel Foods, for example, operates multiple brands like Behrouz Biryani and Faasos, focusing on delivering regional dishes through its cloud kitchen network.

Market Breakup by Platform

- Website
- Mobile Application

Key Insight: Mobile apps play a key role in the India online food delivery market, enabling users to place orders, customise preferences, and track deliveries. With features like push notifications and easy payment methods, they improve user engagement, provide personalised experiences, and boost customer retention. In January 2024, Zomato's subsidiary, Zomato Payments Pvt Ltd (ZPPL), was authorised by the Reserve Bank of India to operate as an online payment aggregator, expanding the company's payment services.

Market Breakup by Delivery Type

- Restaurant-to-Consumer Delivery
- Platform-to-Consumer Delivery

Key Insight: Restaurant-to-consumer delivery remains one of the traditional models where restaurants deliver food directly to consumers. This method is popular for its simplicity, especially for local eateries that don't use third-party delivery platforms. It offers consumers a more direct connection to the restaurant and often allows for fresher meals. With the rise of smaller local restaurants entering the food delivery space, this segment is expected to grow as consumers seek homegrown options.

Market Breakup by Payment Method

- Online
- Cash on Delivery

Key Insight: Online payments have become the preferred payment method, fueled by the rise in digital adoption, cashless transactions, and security features offered by payment gateways. As per India online food delivery market analysis, India's internet user base is poised to exceed 900 million by 2025, driven by increased usage of Indic languages in digital content. With the government's push towards a digital economy and the increasing availability of online payment options, more customers are opting for this method. Platforms are also incentivising online payments with discounts, loyalty points, and other promotional offers.

Market Breakup by Region

- North India
- East and Central India
- West India
- South India

Key Insight: North India leads the market due to its robust food delivery infrastructure, urban population, and high demand for both traditional and modern cuisines. Major cities like Delhi and Chandigarh are key drivers, with high-income groups and busy professionals opting for food delivery services. Popularity is also driven by local food preferences like North Indian and Mughlai dishes, with platforms offering a wide range of choices to cater to these tastes.

India Online Food Delivery Market Share

Rising Popularity of Chinese and Italian Cuisines in the Online Food Delivery Market

Chinese cuisine remains a favorite due to its affordability, variety, and familiarity to a broad audience. Popular options such as fried rice, noodles, and dim sum have become staples in the online delivery market. The convenience and quick preparation time of Chinese food make it a go-to choice for consumers seeking a quick meal, driving strong and consistent demand in the market.

Italian food, including pizzas, pastas, and other classic dishes, continues to grow in popularity in the online food delivery market. Its universal appeal, especially among younger demographics, has made it a reliable option for food delivery platforms. The convenience of offering customisable options and the ability to cater to various dietary preferences help Italian food maintain a solid foothold in the India online food delivery market.

Websites are Enhancing the Online Food Delivery Experience

Websites lead by providing easy access to menus, real-time order tracking, and payment options. They offer a smooth browsing experience, allowing customers to compare restaurants, read reviews, and place orders, enhancing convenience and business visibility. In December 2024, Magicpin launched its 15-minute food delivery service, magicNOW, in six cities, expanding after a successful pilot in Delhi and Bengaluru. The service operates within a 1.5-2 km radius and partners directly with restaurants, completing 75,000 deliveries during the pilot phase.

Platform to Consumer Delivery Driving Growth in the India Online Food Delivery Market

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Platform-to-Consumer Delivery is characterised by third-party platforms like Swiggy and Zomato facilitating the delivery of food from various restaurants to consumers. It accounts for a significant share of the India online food delivery market as these platforms provide consumers with extensive restaurant options, delivery convenience, and promotional offers. The ease of app-based ordering, tracking, and seamless payment options contribute to the growing dominance of this model, especially in urban centers.

Cash on Delivery is a Trusted Payment Method in India's Tier 2 and Tier 3 Cities

Cash on delivery remains a popular payment method, especially in regions with lower digital penetration. Despite the rise of online payments, cash on delivery still holds relevance in tier 2 and tier 3 cities where consumers are less comfortable with online transactions. Some consumers prefer this method due to familiarity and trust in handling physical currency during delivery. Additionally, a study by ClickPost reveals that in these regions, 90% of consumers opt for COD, reflecting a strong inclination towards this payment method.

India Online Food Delivery Market Regional Analysis

South and West India Driving the Surge in Online Food Delivery

South India has a significant market share, driven by the high demand for South Indian cuisines such as dosas, idlis, and biryanis. Cities like Bengaluru, Chennai, and Hyderabad have embraced online food delivery, and the segment continues to grow as consumers prefer convenience, affordability, and the variety of cuisines offered. Bengaluru, often referred to as India's "food tech capital," leads in online food delivery volumes, with daily orders exceeding 50,000-60,000 through platforms like Swiggy and Zomato.

West India, with cities like Mumbai, Pune, and Ahmedabad, represents a growing segment in the India online food delivery market. The region has a strong mix of local eateries, international food chains, and a well-established delivery infrastructure. The rise of food-tech startups and the dominance of global players like Zomato and Swiggy further contribute to the region's performance in the market.

Competitive Landscape

The India online food delivery market key players have expanded their offerings to include food delivery, online ordering, and even table reservations. These companies provide users with detailed information about restaurants, including reviews, menus, and ratings, making it easier for customers to discover dining options. With a strong presence across India and internationally, these companies have made significant strides in the food-tech industry. They also offer services such as loyalty programmes and premium customer services.

By partnering with local restaurants and launching their own kitchen brands, they are offering diverse and affordable meal options tailored to regional preferences. Simultaneously, they are enhancing user engagement through AI-driven personalisation, offering meal suggestions based on customer preferences and order history, which is anticipated to fuel the India online food delivery market.

Zomato Limited

Zomato Limited, founded in 2008 and headquartered in Gurgaon, India, is a leading online food delivery and restaurant discovery platform. The company provides restaurant reviews, menus, and online food ordering services, serving millions of customers across India and international markets.

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Bundl Technologies Pvt Ltd (Swiggy)

Founded in 2014 and based in Bengaluru, India, Bundl Technologies Pvt Ltd operates Swiggy, one of the largest food delivery platforms in India. Swiggy offers on-demand food delivery, restaurant discovery, and other services like groceries, aiming to deliver convenience and speed to consumers nationwide.

Foodvista India Private Limited (FreshMenu)

Foodvista India Private Limited, established in 2014 and headquartered in Bengaluru, India, operates FreshMenu, a food delivery service offering freshly prepared, chef-curated meals. Known for its variety and quality, the company targets urban professionals seeking convenient, healthy meal options.

Jubilant FoodWorks Ltd.

Jubilant FoodWorks Ltd., founded in 1995 and headquartered in Noida, India, is a prominent food service company, best known for its exclusive rights to operate Domino's Pizza and Dunkin' Donuts in India. The company focuses on delivering high-quality fast food through its extensive franchise network.

Other key players in the India online food delivery market report are Yum! Brands, Inc., Plaza Restaurants Private Limited, Curefoods India Private Limited, Rebel Foods, Sky Gate Hospitality Pvt Ltd, and Poncho Hospitality Pvt. Ltd., among others.

Key Features of the Report:

- Comprehensive analysis of market trends, growth drivers, and restraints for 2025-2034
- Market segmentation by cuisines, platform, delivery type, payment method, and region, with forecasted insights
- Quantitative data on market value, volume, and CAGR projections for each segment
- Competitive landscape featuring key players, market shares, and strategic initiatives
- In-depth consumer behaviour analysis, including preferences and spending patterns
- Insights into technological advancements and their impact on food delivery services

Why Choose Expert Market Research?

- Trusted, data-driven insights to help businesses make informed decisions
- Detailed market forecasts to aid long-term planning and strategy development
- Expert analysis backed by robust primary and secondary research methods
- Actionable recommendations that align with industry-specific challenges and opportunities

Call to Action:

Explore the latest insights on the India Online Food Delivery Market Trends for 2025 . Download a free sample of our detailed report to access key market data, growth forecasts, and actionable recommendations. For tailored advice or customized reports, contact us today to gain a competitive edge and stay ahead in this rapidly evolving industry.

More Insights On:

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Table of Contents:

- 1 Executive Summary
- 1.1 Market Size 2024-2025
- 1.2 Market Growth 2025(F)-2034(F)
- 1.3 Key Demand Drivers
- 1.4 Key Players and Competitive Structure
- 1.5 Industry Best Practices
- 1.6 Recent Trends and Developments
- 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
- 2.1 Market Trends
- 2.2 Key Verticals
- 2.3 Key Regions
- 2.4 Supplier Power
- 2.5 Buyer Power
- 2.6 Key Market Opportunities and Risks
- 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
- 3.1 GDP Outlook
- 3.2 GDP Per Capita Growth
- 3.3 Inflation Trends
- 3.4 Democracy Index
- 3.5 Gross Public Debt Ratios
- 3.6 Balance of Payment (BoP) Position
- 3.7 Population Outlook
- 3.8 Urbanisation Trends
- 4 Country Risk Profiles
- 4.1 Country Risk
- 4.2 Business Climate
- 5 Global Online Food Delivery Market Overview
- 5.1 Key Industry Highlights
- 5.2 Global Online Food Delivery Historical Market (2018-2024)
- 5.3 Global Online Food Delivery Market Forecast (2025-2034)
- 5.4 Global Online Food Delivery Market Share by Region
- 5.4.1 North America
- 5.4.2 Europe
- 5.4.3 Asia Pacific
- 5.4.4 Latin America
- 5.4.5 Middle East and Africa
- 6 India Online Food Delivery Market Overview
- 6.1 Key Industry Highlights
- 6.2 India Online Food Delivery Historical Market (2018-2024)
- 6.3 India Online Food Delivery Market Forecast (2025-2034)

7 India Online Food Delivery Market by Cuisine

7.1 Indian

7.1.1 Historical Trend (2018-2024)

7.1.2 Forecast Trend (2025-2034)

7.2 Chinese

7.2.1 Historical Trend (2018-2024)

7.2.2 Forecast Trend (2025-2034)

7.3 Italian

7.3.1 Historical Trend (2018-2024)

7.3.2 Forecast Trend (2025-2034)

7.4 Others

8 India Online Food Delivery Market by Platform

8.1 Website

8.1.1 Historical Trend (2018-2024)

8.1.2 Forecast Trend (2025-2034)

8.2 Mobile Application

8.2.1 Historical Trend (2018-2024)

8.2.2 Forecast Trend (2025-2034)

9 India Online Food Delivery Market by Delivery Type

9.1 Restaurant-to-Consumer Delivery

9.1.1 Historical Trend (2018-2024)

9.1.2 Forecast Trend (2025-2034)

9.2 Platform-to-Consumer Delivery

9.2.1 Historical Trend (2018-2024)

9.2.2 Forecast Trend (2025-2034)

10 India Online Food Delivery Market by Payment Method

10.1 Online

10.1.1 Historical Trend (2018-2024)

10.1.2 Forecast Trend (2025-2034)

10.2 Cash on Delivery

10.2.1 Historical Trend (2018-2024)

10.2.2 Forecast Trend (2025-2034)

11 India Online Food Delivery Market by Region

11.1 North India

11.1.1 Historical Trend (2018-2024)

11.1.2 Forecast Trend (2025-2034)

11.1.3 Market by Leading States

11.2 East and Central India

11.2.1 Historical Trend (2018-2024)

11.2.2 Forecast Trend (2025-2034)

11.2.3 Market by Leading States

11.3 West India

11.3.1 Historical Trend (2018-2024)

11.3.2 Forecast Trend (2025-2034)

11.3.3 Market by Leading States

11.4 South India

11.4.1 Historical Trend (2018-2024)

11.4.2 Forecast Trend (2025-2034)

11.4.3 Market by Leading States

12 Market Dynamics

12.1 SWOT Analysis

12.1.1 Strengths

12.1.2 Weaknesses

12.1.3 Opportunities

12.1.4 Threats

12.2 Porter's Five Forces Analysis

12.2.1 Supplier's Power

12.2.2 Buyer's Power

12.2.3 Threat of New Entrants

12.2.4 Degree of Rivalry

12.2.5 Threat of Substitutes

12.3 Key Indicators for Demand

12.4 Key Indicators for Price

13 Competitive Landscape

13.1 Supplier Selection

13.2 Key Global Players

13.3 Key Regional Players

13.4 Key Player Strategies

13.5 Company Profiles

13.5.1 Zomato Limited

13.5.1.1 Company Overview

13.5.1.2 Product Portfolio

13.5.1.3 Demographic Reach and Achievements

13.5.1.4 Certifications

13.5.2 Bundl Technologies Pvt Ltd (Swiggy)

13.5.2.1 Company Overview

13.5.2.2 Product Portfolio

13.5.2.3 Demographic Reach and Achievements

13.5.2.4 Certifications

13.5.3 Foodvista India Private Limited (FreshMenu)

13.5.3.1 Company Overview

13.5.3.2 Product Portfolio

13.5.3.3 Demographic Reach and Achievements

13.5.3.4 Certifications

13.5.4 Jubilant FoodWorks Ltd.

13.5.4.1 Company Overview

13.5.4.2 Product Portfolio

13.5.4.3 Demographic Reach and Achievements

13.5.4.4 Certifications

13.5.5 Yum! Brands, Inc.

13.5.5.1 Company Overview

13.5.5.2 Product Portfolio

13.5.5.3 Demographic Reach and Achievements

13.5.5.4 Certifications

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- 13.5.6 Plaza Restaurants Private Limited
 - 13.5.6.1 Company Overview
 - 13.5.6.2 Product Portfolio
 - 13.5.6.3 Demographic Reach and Achievements
 - 13.5.6.4 Certifications
- 13.5.7 Curefoods India Private Limited
 - 13.5.7.1 Company Overview
 - 13.5.7.2 Product Portfolio
 - 13.5.7.3 Demographic Reach and Achievements
 - 13.5.7.4 Certifications
- 13.5.8 Rebel Foods
 - 13.5.8.1 Company Overview
 - 13.5.8.2 Product Portfolio
 - 13.5.8.3 Demographic Reach and Achievements
 - 13.5.8.4 Certifications
- 13.5.9 Sky Gate Hospitality Pvt Ltd
 - 13.5.9.1 Company Overview
 - 13.5.9.2 Product Portfolio
 - 13.5.9.3 Demographic Reach and Achievements
 - 13.5.9.4 Certifications
- 13.5.10 Poncho Hospitality Pvt. Ltd.
 - 13.5.10.1 Company Overview
 - 13.5.10.2 Product Portfolio
 - 13.5.10.3 Demographic Reach and Achievements
 - 13.5.10.4 Certifications
- 13.5.11 Others

India Online Food Delivery Market Growth Analysis - Market Size, Share, Forecast Trends and Outlook Report (2025-2034)

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