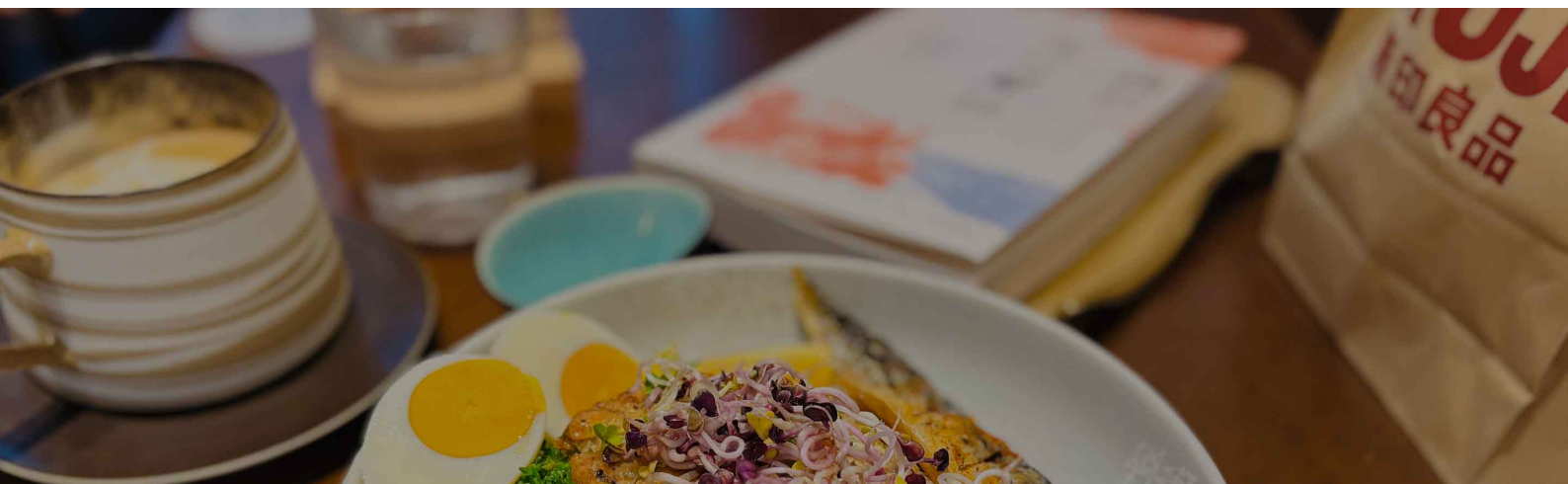




How India eats

Executive summary

[Consumer and Retail](#) / Report

January 07, 2026

India's food services market is projected to exceed \$125 billion by 2030, up from \$78 billion in 2025, implying around 10 percent CAGR over the next few years.

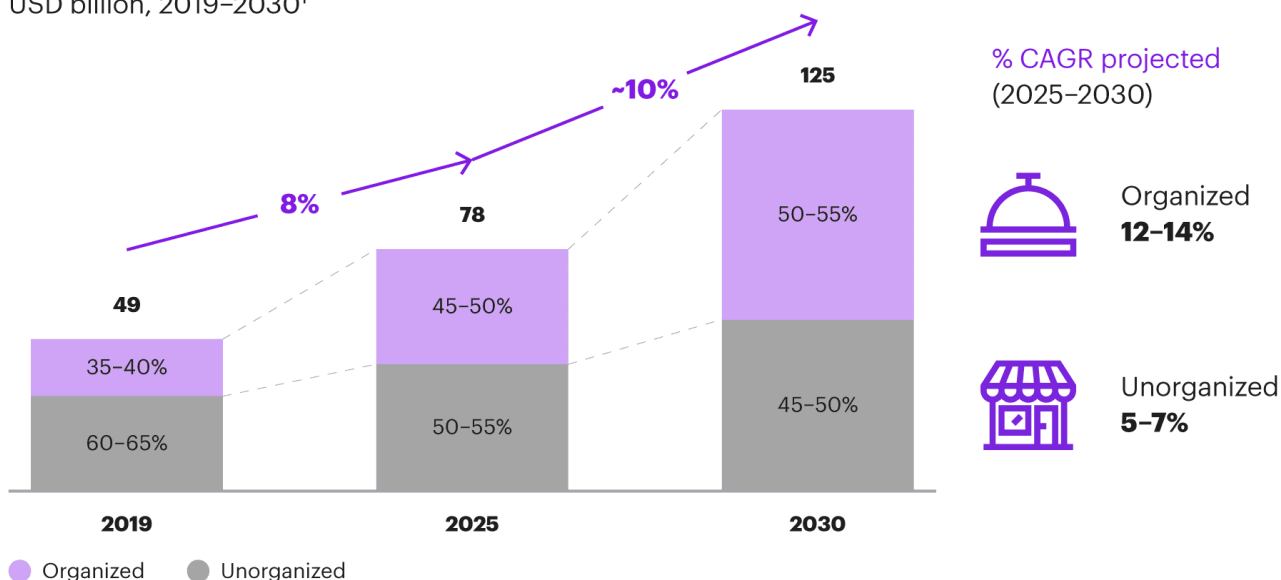
The real story, however, is the rapid formalization of the sector (see figure 1).

Figure 1

The organized segment is expected to grow at 2x the pace of the unorganized segment, surpassing it by 2030

Indian food service market

USD billion, 2019–2030¹



¹ Exchange rate: 85 INR per USD

Source: Kearney analysis

- The organized segment is expected to grow at 12 to 14 percent annually, roughly 2x the pace of the unorganized market (5 to 7 percent).
- By 2030, organized players are projected to overtake unorganized outlets, reaching 50 to 55 percent share of industry value, up from 35 to 40 percent in 2019.

Key growth drivers:

- Cloud kitchens, QSRs, and dessert parlors lead with above-average growth rates of 32 to 37 percent, 14 to 16 percent, and 15 to 17 percent, respectively.
- Rising GDP per capita is positioning India in the “food services growth band,” tracking toward patterns seen in other developing nations.
- Aggregator-driven expansion and speed-led quick commerce propositions such as Bolt are reshaping delivery ecosystems.
- Growth beyond metros: dining-out growth in the next 100+ cities is already about 2x that of the top metros.

India’s palate is widening

Consumers are experimenting more than ever:

- The number of unique cuisines ordered per customer has grown about 20 percent over four years.
- The number of restaurants ordered from per customer per year is up about 30 percent.

India's culinary heritage rediscovered

India is home to rich culinary diversity, where every district reflects unique tastes and preferences (see figure 2).

Figure 2

India is home to rich culinary diversity, where every district reflects unique tastes and preferences



Source: Kearney analysis

Hyperlocal Indian cuisines—such as Pahari (8.3× growth), Bihari (3.1× growth), and Goan (2× growth)—are experiencing significantly higher growth compared to traditional North and South Indian staples. This renaissance of regional Indian food is powered by authenticity, storytelling, and cultural pride.

Global cuisines go mainstream

On the global side, Chinese remains the baseline, but newer Asian cuisines are expanding at outsized rates:

- Vietnamese cuisine is growing at 6.0x as compared to Chinese.
- Korean cuisine is growing at 17.0x as compared to Chinese.

QSR and casual chains are adapting with “Indianized global” offerings—Korean gochujang burgers, Mexican formats with Indian fillings, or butter-chicken sushi—to bridge curiosity and comfort.

The “SAUCE” playbook to win for the brand

The report distills winning strategies into a simple “SAUCE” formula:

S – Speed: Compete on delivery time with quick-commerce-friendly menus.

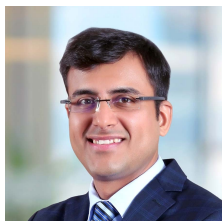
A – Affordability: Tailor price ladders by cuisine and city tier.

U – Unboxing experience: Make packaging functional, immersive, and story-rich.

C – Consumer health: Build credible “better-for-you” propositions, not just low-calorie claims.

E – Engagement: Digital, experiences, and founder storytelling to connect—especially with Gen Z.

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