



Full-Service Restaurants in India

March 2026

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumers increasingly value ambience, service, and overall experience

INDUSTRY PERFORMANCE

Full-service restaurants gain momentum as consumer dining confidence rises
Asian full-service restaurants retain the largest share, aligning with Indian taste preferences
Value-conscious consumers shape full-service restaurants' menus and pricing strategies

WHAT'S NEXT?

Full-service restaurant sales set to grow as consumers return to out-of-home dining
Fulfilment evolution enhances convenience without compromising the full-service experience
Innovation drives menu relevance and experiential differentiation

COMPETITIVE LANDSCAPE

Pizza Hut continues to lead through menu innovation and strategic engagement
Independent operators lead, balancing affordability, quality, and local relevance

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EXECUTIVE SUMMARY

Rising price sensitivity driven by inflation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Inflation shapes demand
Convenience and fulfilment redefine access in Indian foodservice
Experiences and loyalty programmes drive differentiation in a competitive market

WHAT'S NEXT?

Rising urban demand and convenience drive foodservice growth
Menu and delivery innovation reshape consumer experiences
Sustainability becomes a key differentiator to strengthen brand appeal and consumer loyalty

COMPETITIVE LANDSCAPE

Domino's Pizza maintains its lead through digital dominance and delivery scale
Street stalls/kiosks dominate while limited-service restaurants lead growth in 2025
Third-party delivery reshapes fulfilment and accelerates market access

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Independent operators dominate, reflecting strong demand for local and regional offerings, affordable pricing, and flexible formats
Innovation drives differentiation among chained and independent operators

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