



Euromonitor
International

Cafés/Bars in India

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2025 DEVELOPMENTS

Rising prices and tighter budgets reduce visit frequency

INDUSTRY PERFORMANCE

Slowed growth with intensifying competition and cautious spending

Menu diversification and new formats drive growth of cafés in 2025

Consumers balance value and indulgence as cafés/bars navigate affordability pressures in 2025

WHAT'S NEXT?

Urban expansion and premiumisation support value growth

Fulfilment innovation drives convenience and accessibility in cafés/bars

Menu and experiential innovation to strengthen consumer appeal

COMPETITIVE LANDSCAPE

Starbucks maintains its lead through premiumisation and network expansion

Social's dynamic growth propelled by experienced formats and menu innovation

Independent operators continue to dominate, buoyed by local relevance and everyday accessibility

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Consumer Foodservice in India - Industry Overview

EXECUTIVE SUMMARY

Rising price sensitivity driven by inflation

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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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