



Euromonitor
International

Full-Service Restaurants in India

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Table of Contents

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

CATEGORY DATA

- Table 1 - Full-Service Restaurants by Category: Units/Outlets 2020-2025
- Table 2 - Sales in Full-Service Restaurants by Category: Number of Transactions 2020-2025
- Table 3 - Sales in Full-Service Restaurants by Category: Foodservice Value 2020-2025
- Table 4 - Full-Service Restaurants by Category: % Units/Outlets Growth 2020-2025
- Table 5 - Sales in Full-Service Restaurants by Category: % Transaction Growth 2020-2025
- Table 6 - Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2020-2025
- Table 7 - GBO Company Shares in Chained Full-Service Restaurants: % Foodservice Value 2021-2025
- Table 8 - GBN Brand Shares in Chained Full-Service Restaurants: % Foodservice Value 2022-2025
- Table 9 - Forecast Full-Service Restaurants by Category: Units/Outlets 2025-2030
- Table 10 - Forecast Sales in Full-Service Restaurants by Category: Number of Transactions 2025-2030
- Table 11 - Forecast Sales in Full-Service Restaurants by Category: Foodservice Value 2025-2030
- Table 12 - Forecast Full-Service Restaurants by Category: % Units/Outlets Growth 2025-2030
- Table 13 - Forecast Sales in Full-Service Restaurants by Category: % Transaction Growth 2025-2030
- Table 14 - Forecast Sales in Full-Service Restaurants by Category: % Foodservice Value Growth 2025-2030

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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

CHANNELS

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

MARKET DATA

Table 15 - Units, Transactions and Value Sales in Consumer Foodservice 2020-2025
Table 16 - Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2020-2025
Table 17 - Consumer Foodservice by Independent vs Chained by Type: Units/Outlets 2025
Table 18 - Consumer Foodservice by Independent vs Chained: % Foodservice Value 2020-2025
Table 19 - Sales in Consumer Foodservice by Food vs Drink Split: % Foodservice Value 2020-2025
Table 20 - Sales in Consumer Foodservice by Food vs Drink Split by Type: % Foodservice Value 2025
Table 21 - Sales in Consumer Foodservice by Location: % Foodservice Value 2020-2025
Table 22 - Sales in Consumer Foodservice by Fulfillment: % Foodservice Value 2020-2025
Table 23 - GBO Company Shares in Chained Consumer Foodservice: % Foodservice Value 2021-2025
Table 24 - GBN Brand Shares in Chained Consumer Foodservice: % Foodservice Value 2022-2025
Table 25 - GBN Brand Shares in Chained Consumer Foodservice: Units/Outlets 2025
Table 26 - Forecast Units, Transactions and Value Sales in Consumer Foodservice 2025-2030
Table 27 - Forecast Units, Transactions and Value Sales in Consumer Foodservice: % Growth 2025-2030

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SOURCES

Summary 1 - Research Sources

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