

Online Food Delivery Market in India (2018-2023) with data on Business Models, Daily Order Volume and top States as per Online Food Ordering Volume

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Abstracts

The meaning of food tech has evolved over the years. Earlier, it only referred to the technology used for food processing. Now, it pertains to online food ordering and delivery services. Adequate investments in this market space have enabled companies to provide online food delivery services that were previously non-existent. The online food delivery industry of India, which is the part of the e-services market, has two different delivery service solutions meant for prepared meals – restaurant-to-customer delivery system, and platform-to-customer delivery system. The service providers operate in any of the following four models: milk run model, hub and spoke model, point to point delivery model, and decentralized delivery network.

Market insights:

The online food delivery market in India was valued at INR 45.58 Bn in 2017 and is expected to expand at a compound annual growth rate (CAGR) of ~38.08% from 2018 to 2023. Metropolitan cities like Bengaluru, Delhi, Mumbai, Pune, Kolkata, Chennai, and Hyderabad accounted for ~87% of the overall online food delivery market in India in 2017. Among the major players, Bengaluru-based online food delivery player, Swiggy is currently the market leader constituting of ~36.5% of the market, followed by Zomato. The percentage of daily orders fulfilled by the self-owned delivery fleet of companies has increased from ~46% to ~56% and the average delivery time of the overall market improved from 47 minutes to 42 minutes during the period Q4 of 2016 to Q4 of 2017.

State-wise segment insights:

Based on the volume of food ordered online in 2017, Bangalore accounts for a ~31%

share in the entire market. It is followed by Delhi NCR (~19%), Mumbai, Hyderabad, and Pune.

Daily order volume insights:

Considering the business of online food aggregators, as of March 2018, Swiggy has handled ~200,000 orders, and Zomato has handled ~180,000 orders. Foodpanda and UberEats are the other two competitors with order handling volume of ~30,000 and ~15,000 respectively.

Key growth drivers of the market:

Amongst the ~1.35 Bn population in India, 50% fall under the age of 25 years while half of the rest falls under the age of 35 years, thus representing one of the youngest populations of the world. Since the majority of demand comes from the age group between 18 and 40, India has emerged as a market with a high opportunity for growth.

India's per capita income has shown a growth of ~8.6% for the fiscal year ending in March 2018. As a result, Indians are gaining a high purchasing power which in turn is paving the way for the growth of online food delivery market in the country.

Key deterrents to the growth of the market:

The continuous entrance of new players in the online food delivery market is leading to the fragmentation of the customer base. As a result, the volume of sales of the entire market is getting distributed among a number of players, thus reducing the revenue share of a particular online food delivery service provider.

Many e-commerce firms are showing a tendency of entering into the online food delivery market because of its excellent business opportunity. Therefore the entrance of the big restaurant and fast food chains and e-commerce companies to the online food delivery market is making the competition for the smaller firms and start-ups steeper.

Companies covered:

Bundl Technologies Pvt. Ltd. (Swiggy)

Faasos Food Services Pvt. Ltd.

Holachef Hospitality Pvt. Ltd.

Zomato Media Pvt. Ltd.

Foodpanda India

Uber Technologies, Inc. (UberEats)

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