

Retail Network Report

Fast Food & QSR

2023 | India 

Welcome to the first edition of GapMaps' Retail Network Report for India's Fast Food & Quick Service Retail Sector. GapMaps brings unique insights and key trends into the changing competitive landscape of the Fast Food & Quick Service Retail Sector released bi-annually.

Further in-depth analysis can be undertaken within the GapMaps' Live platform which is updated monthly to provide the latest view of QSR and Fast Food store locations across all tracked brands.



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Brands Tracked

13

Locations

6,206

Stores in Largest Three Cities

1,887

Cities* with a Domino's Store

11%

*Urban agglomerations with at least 1,00,000 residents

Store Count



Brand	Store Count
Domino's	1,499
Pizza Hut	787
KFC	769
Subway	674
Wow! Momo	544
McDonald's	503
La Pino'z Pizza	490
Burger King	377
Barbeque Nation	214
Taco Bell	129
Biggies Burger	85
Paradise Biryani	70
Smokin Joe's Pizza	65

*Greater Delhi, Mumbai, Kolkata, Bengaluru, Chennai, Pune, Ahmedabad, Surat

**Lucknow, Patna, Varanasi, Kanpur, Nagpur, Kochi, Indore, Jamshedpur, Agra, Jaipur, Chandigarh, Visakhapatnam, Muzaffarpur, Bhopal, Gaya, Ranchi, Ludhiana, Meerut, Vijayawada, Vadodara, Coimbatore, Prayagraj

Source: Store counts are as published by brands on company websites and have not been confirmed directly with the brand.

Store Penetration:

Percentage of cities where the brands has at least one store

	8	22	56	211	1,011	1,842	3,150
	Tier 1a Cities*	Tier 1b Cities**	Tier 1c Cities	Tier 2 Cities	Tier 3 Cities	Tier 4 Cities	Cities
	with over 40 lakh residents	with over 20 lakh residents	with over 10 lakh residents	with over 5 lakh residents	with over 2 lakh residents	with over 1 lakh residents	with over 1 lakh residents
Domino's	100%	100%	93%	51%	12%	2%	11%
Pizza Hut	100%	95%	68%	29%	4%	1%	6%
KFC	100%	95%	66%	25%	5%	1%	6%
Subway	100%	82%	48%	13%	4%	1%	4%
Wow! Momo	100%	95%	55%	16%	4%	1%	5%
McDonald's	100%	68%	29%	9%	1%	0%	2%
La Pino'z Pizza	100%	82%	30%	18%	5%	1%	5%
Burger King	100%	86%	38%	7%	2%	0%	3%
Barbeque Nation	100%	86%	48%	11%	0%	0%	3%
Taco Bell	100%	55%	9%	1%	0%	0%	1%
Biggies Burger	63%	36%	7%	3%	1%	0%	1%
Paradise Biryani	50%	9%	2%	3%	0%	0%	1%
Smokin Joe's Pizza	38%	0%	4%	0%	0%	0%	0%