

Retail Network Report

Café

2023 | India 

Welcome to the first edition of GapMaps' Retail Network Report for India's Café Sector. Every year GapMaps brings you unique insights and key trends into the changing competitive landscape of the Café Sector.

Further in depth analysis can be undertaken within the GapMaps' platform.



Scott Johnson, Senior Analyst
scott@gapmaps.com

Brands Tracked

9

Locations

1,802

Stores in Largest Three Cities

735

Cities* with a Café Coffee Day Store

4%

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

Store Count



Brand	Store Count
Cafe Coffee Day ³	436
Barista	350
Starbucks	340
Chaayos ⁴	185
Theobroma	153
Costa Coffee	117
Third Wave Coffee Roasters	102
Blue Tokai Coffee	78
Krispy Kreme	41

Store Penetration:

Percentage of cities where the brands has at least one store

	11 Tier 1a Cities ¹ with over 40 Lakh residents	15 Tier 1b Cities ² with over 20 Lakh residents	49 Tier 1c Cities with over 10 Lakh residents	75 Tier 2 Cities with over 5 Lakh residents	518 Tier 3 Cities with over 2 Lakh residents	1,380 Tier 4 Cities with over 1 Lakh residents	2,048 Cities with over 1 Lakh residents
Cafe Coffee Day ³	91%	80%	53%	19%	3%	1%	4%
Barista	91%	80%	41%	19%	4%	1%	5%
Starbucks	100%	60%	29%	5%	1%	1%	2%
Chaayos ⁴	55%	7%	0%	3%	0%	0%	0%
Theobroma	64%	7%	4%	0%	0%	0%	0%
Costa Coffee	73%	40%	8%	4%	0%	0%	1%
Third Wave Coffee Roasters	45%	7%	0%	0%	0%	0%	0%
Blue Tokai Coffee	55%	7%	0%	0%	0%	0%	0%
Krispy Kreme	27%	0%	0%	0%	0%	0%	0%

1. Greater Delhi, Mumbai, Kolkata, Bengaluru, Chennai, Pune, Ahmedabad, Surat

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

3. As listed on brand website. Latest annual report (August 2022) reported a store count of 495, down from 1,331 report in March 2020.

4. Brand website lists 104 locations. GapMaps located an additional 81 locations across the country.

Source: All locations are sourced from the relevant brand's website unless otherwise stated. They have not been confirmed with the brand.