

India's Grocery Market to Grow from ₹55.9T to ₹84.3T by 2030.

IMAGES Business OF *food*

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**FMCG: THE GROWTH
DECADE**

₹28 Lakh Crore and
Rising: Inside India's
Great Food & FMCG
Transformation.

RESEARCH

Redseer Decodes India
Grocery: Why Scale Fails
When Baskets Stay Small.



Gopala's

Quiet Rise Through
Trust, Purity and
Consistency

KARTIK ARORA, Managing Director, Gopala

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Editor's Note

➔ India's food economy is entering a defining phase—one where scale, trust and distribution are being renegotiated simultaneously. The March edition of IMAGES Business of Food explores this evolving landscape through stories that capture both legacy and transformation across the sector.

Our cover story spotlights Kartik Arora, Managing Director of Gopala, whose brand journey offers a compelling counterpoint to the rapid formalisation sweeping India's food retail market. What began as a modest dairy shop in South Delhi has grown into a 40-store network across Delhi NCR—not through aggressive expansion, but through the slow institutionalisation of neighbourhood trust. In an industry increasingly defined by scale and speed, Gopala reminds us that purity, freshness and consistency remain the most enduring brand currencies.

Complementing this narrative of legacy is our deep-dive feature on India's evolving Fast-Moving Consumer Goods landscape. Titled The Growth Decade: Inside India's Great Food & FMCG Transformation, the analysis examines how food, once a secondary priority for large FMCG conglomerates has emerged as a strategic growth engine. Historically overshadowed by the high margins of personal and home care categories, food is now commanding boardroom attention as companies recognise its potential for long-term consumer engagement, resilience and scale.

Rounding out the edition is a research-driven analysis of India's grocery economy based on insights from Redseer Strategy Consultants. The report underscores the sheer magnitude of the opportunity, with the market valued at ₹55.9 trillion in 2025 and projected to reach ₹84.3 trillion by 2030. Yet the data reveals a fascinating paradox: despite the rapid rise of organised retail and digital commerce, kirana stores continue to dominate the ecosystem, holding nearly 91% of the market today.

Together, these stories illustrate a central truth about India's food business—modernisation may be accelerating, but trust, habit and proximity still define the consumer's plate.



Amitabh Taneja | Editor-in-Chief

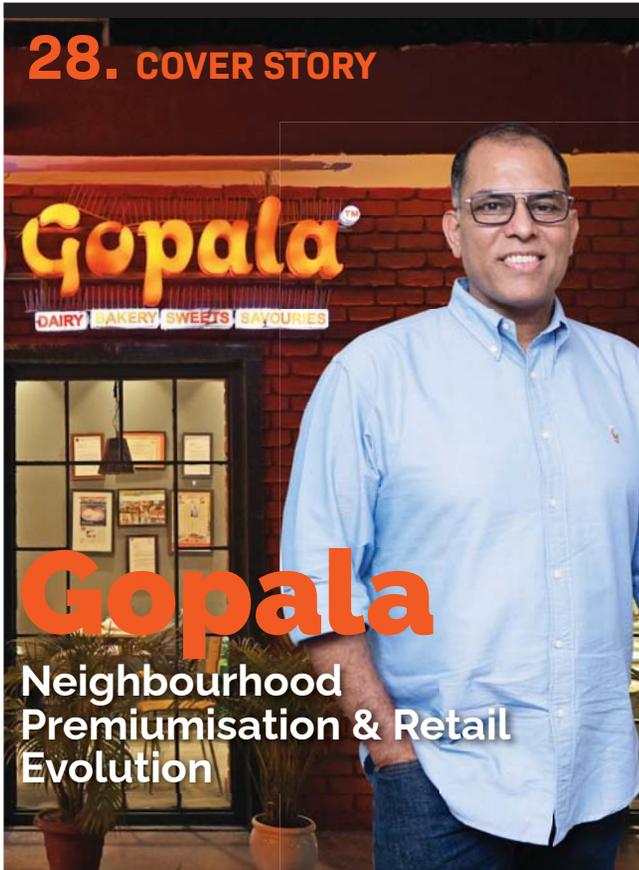
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28. COVER STORY



18. FMCG | The Growth Decade |

₹28 Lakh Crore and Rising: Inside India's Great Food & FMCG Transformation.

34. Research | Indian Grocery

Redseer Decodes India Grocery: Why Scale Fails When Baskets Stay Small.

36. Everyday Meal

Building a Branded Roll Experience: How RollsKing Engineered India's Everyday Roll Economy.



40. Grocery Retail

Reimagining Retail: The Organic World's Pursuit of Affordability, Quality, and Trust.

44. Craft Spirits

How India's Rising Middle Class is Shaping Consumer Preferences in the Alco-Bev Industry.



46. E-commerce | Shopping Trends

How Bharat's Value-Conscious Shoppers are Rewriting India's E-commerce Growth Story.



48. Retail Buzz

Word on the Street.

52. Ready to Cook

The Future of Frozen and Processed Foods in India.



08. News in Numbers

Food & Grocery and Food Service insights through numbers.

10. Market Update

News and reports on the Food Retail and Food Service sectors.



16. Exhibition | Confectionery, Chocolates and Bakery

CBEX 2026 Set to Spotlight India's Expanding Confectionery, Chocolates and Bakery Sectors.

Packaged Snacks Market 2025–26

GLOBAL PACKAGED SNACKS MARKET SIZE



2025: **\$650–700 BN.**

2030: **900+ BN.**

CAGR (2025–30): **5% – 6%**

INDIA PACKAGED SNACKS MARKET SIZE



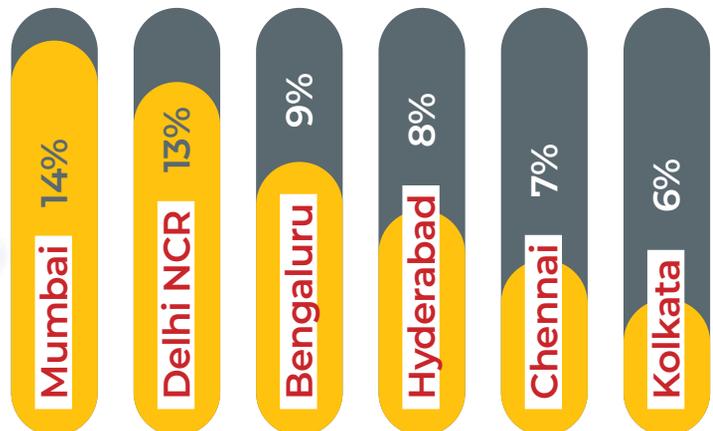
2025: **₹58,000 CRORE**

2030: **₹95,000 CRORE**

CAGR (2025–30): **10% – 11%**



India's City-wise Share of Organised Packaged Snacks Consumption (Estimated Share)



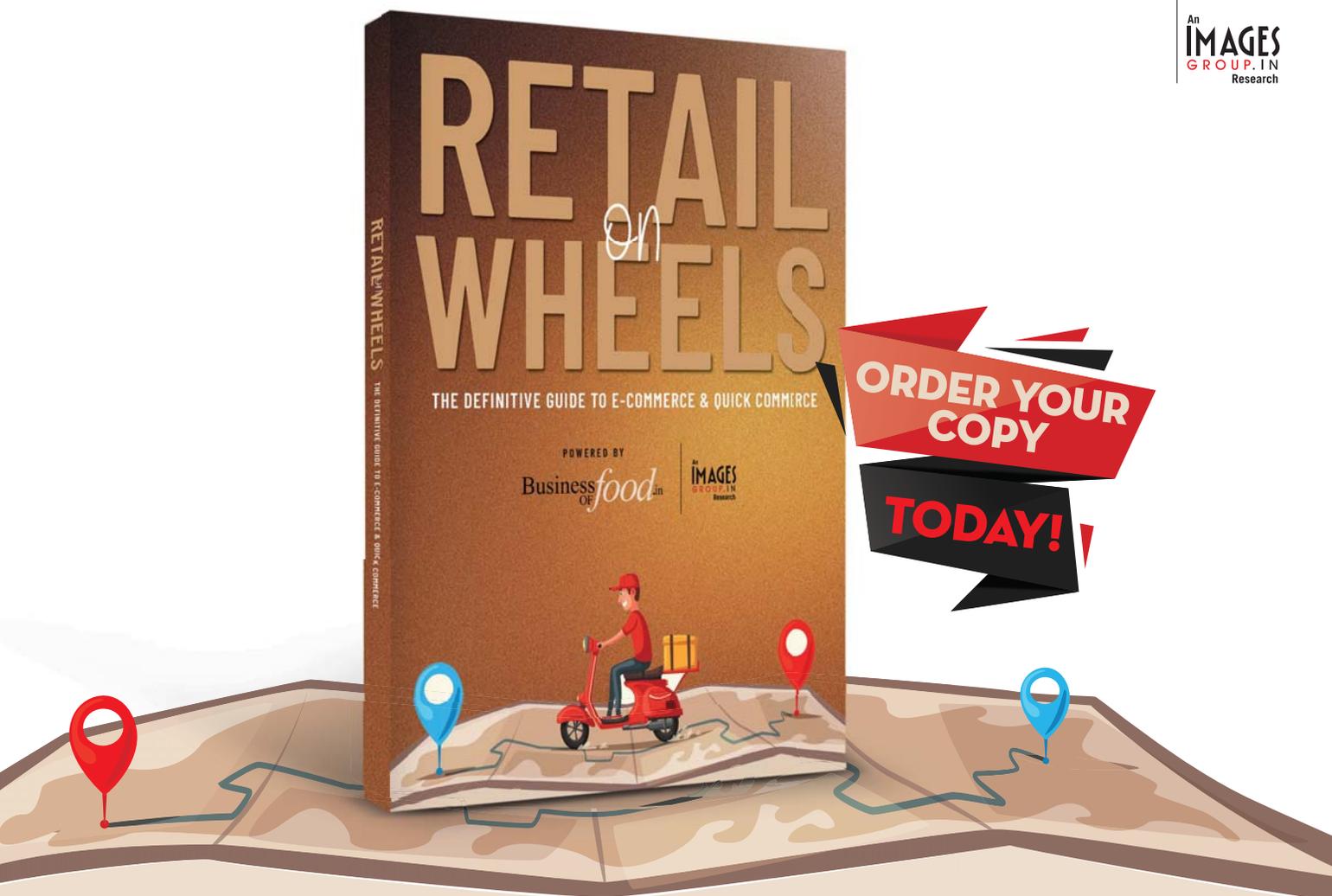
Source: IMARC Group – Global & India Snacks Market Outlook 2025.

₹28 Lakh Crore and Rising Inside India's Great Food & FMCG Transformation

From Amul's Cooperative revolution to Reliance's digital grocery empire — How India's food economy is scaling towards a Trillion-Dollar opportunity.

By R S Roy





The Definitive Quick Commerce Report for Food & FMCG businesses.

Retail on Wheels captures how India has turned e-commerce into an art form — powered by proximity, purpose, and a bit of chaos management. It's not just a market report; it's a mirror of how the world's most complex retail ecosystem learned to move faster than traffic on the Western Express Highway.

Covered in the Report

Foundations:
Demand, Definitions & the Digital Flywheel

Speed & Proximity:
Building the Instant-Commerce Stack

E-Commerce 2030:
Growth, Profitability & the New Rules of Engagement

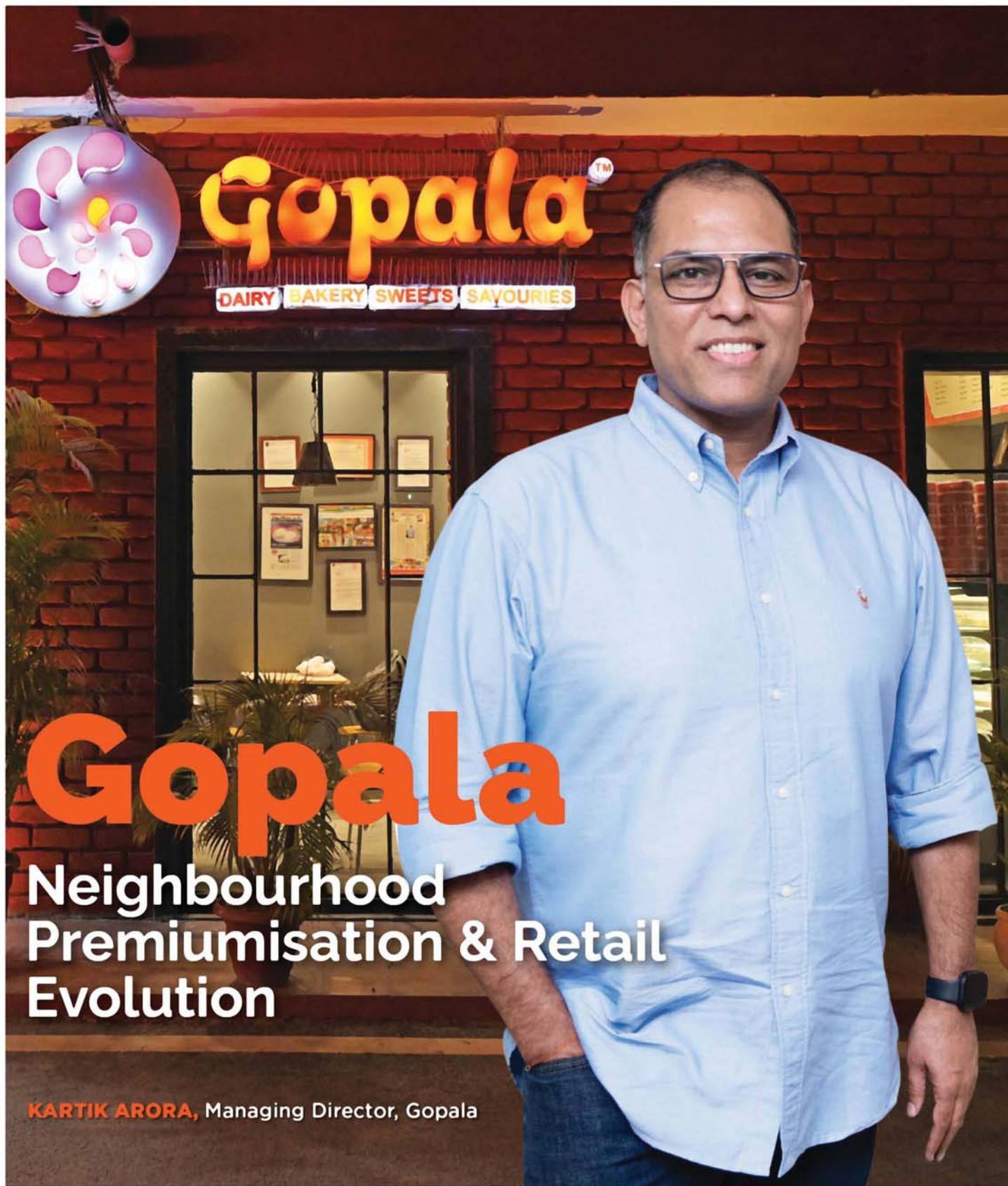
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Gopala

Neighbourhood Premiumisation & Retail Evolution

KARTIK ARORA, Managing Director, Gopala



In India's fast-paced urban routine, food must travel as efficiently as people do. RollsKing built its business around this reality serving dependable, handheld meals designed for speed, consistency and repeat consumption.

By Sandeep Kumar



Building a Branded Roll Experience: How RollsKing Engineered India's Everyday Roll Economy

India's urban food habits have undergone a quiet transformation over the past decade. Meals are no longer confined to fixed dining hours or elaborate formats. Instead, consumption increasingly happens in transit—between work shifts, during short breaks, or late at night after long commutes.

It is within this evolving consumption pattern that RollsKing found its purpose. Founded in 2011, the brand was structured around a simple yet practical insight: a complete meal must remain functional in one hand. This idea shaped every operational choice—from menu design and packaging to store layouts and service flow. At the heart of the concept lies the parantha-based roll, filled with protein-led ingredients and designed for convenience without sacrificing familiarity. Egg, paneer, chicken and other variants cater to India's diverse dietary preferences while maintaining disciplined preparation processes. The outcome is a format that travels well, eats cleanly and delivers flavours that resonate with India's street-food heritage.

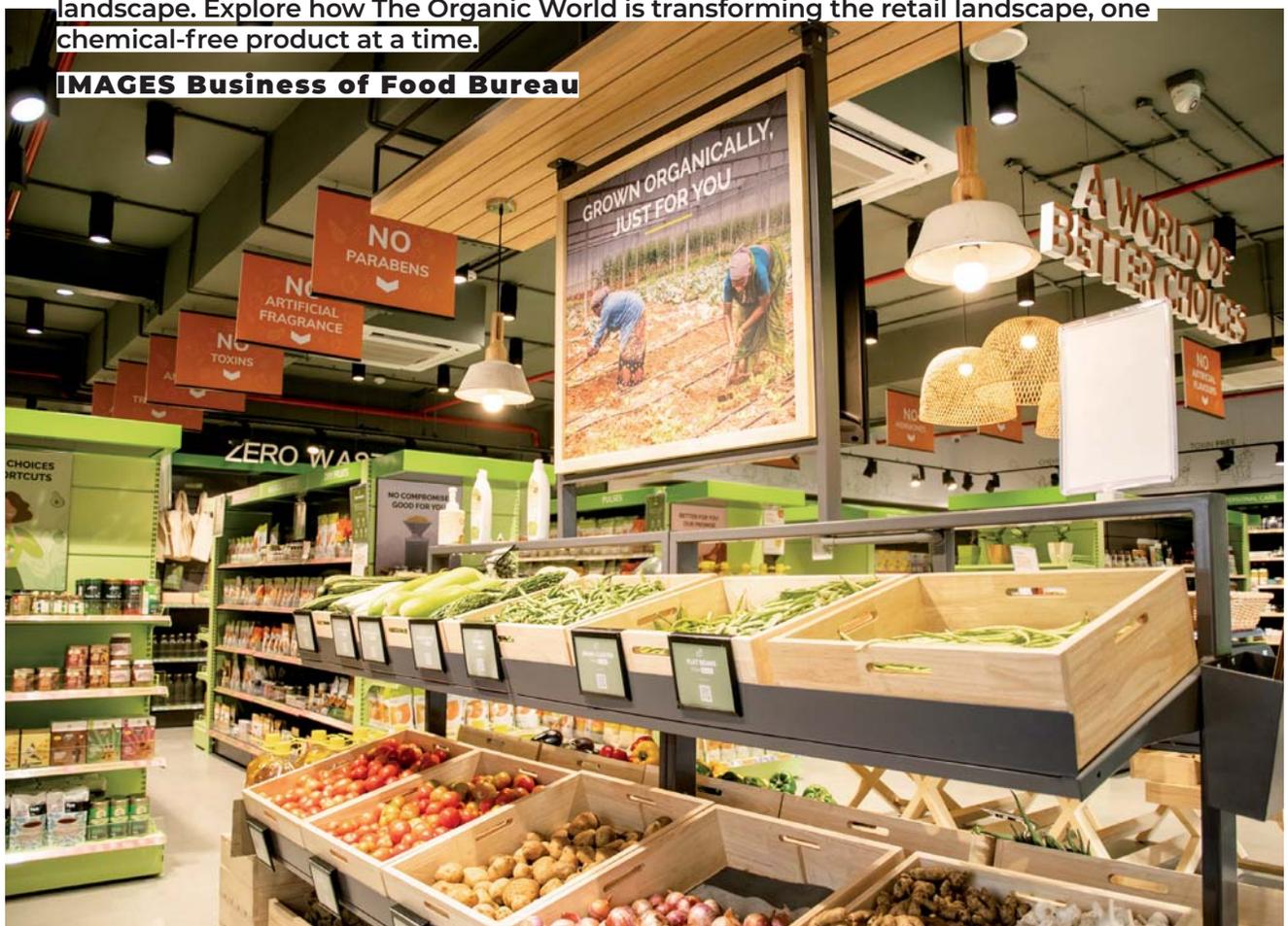
While inspired by the cultural familiarity of the kathi roll, RollsKing approached the category with a more structured mindset. The brand introduced controlled

Reimagining Retail

The Organic World's Pursuit of Affordability, Quality, and Trust

As health-conscious and sustainability-focused lifestyles gain momentum in India, The Organic World has positioned itself as more than just a retailer - it is emerging as an industry pioneer. Combining aggressive expansion with innovative offerings like plant-based homecare products and clean-label snacks, the brand is carving a niche in a competitive landscape. Explore how The Organic World is transforming the retail landscape, one chemical-free product at a time.

IMAGES Business of Food Bureau



Over the past two years, The Organic World has witnessed remarkable growth exceeding 100%. This aggressive scaling has enabled the brand to cater to the surging demand for chemical-free products across urban India, providing consumers with easy access to curated, wholesome groceries that resonate with the rise of health-conscious living. In tandem with its geographical growth, The Organic World has embraced product innovation to solidify its market presence.

The introduction of the Osh line, alongside the expansion of WellBe Foods into distinctive snacks underscores the brand's ability to merge tradition with modern consumer tastes. Consumer education remains central to TOW's philosophy, fostering trust and transparency through insightful marketing campaigns and thoughtfully curated

How Bharat's Value-Conscious Shoppers are Rewriting India's E-commerce Growth Story

As nearly 150 million Bharat households come online, their regional preferences, price sensitivity, and aspiration-led choices are reshaping India's e-commerce playbook. From vernacular discovery and local brands to value-led baskets and repeat frequency, Bharat is no longer an emerging segment—it is the engine powering the industry's next decade of growth.

By Kamaldeep Singh



India's next phase of e-commerce growth is being shaped by Bharat. This fast-growing consumer base spans nearly 150 million households across metro and non-metro cities, earns an average monthly income of fifty thousand to sixty thousand rupees, and is projected to account for over one trillion dollars in consumption by the end of the decade. This is not a peripheral audience. Bharat sits at the centre of India's consumption future, and its behaviour is fundamentally reshaping how ecommerce platforms must operate, scale, and earn trust.

Regional Roots, Local Influence

Bharat is not a single market. It is a mosaic of regions, languages, food habits, festivals, and price sensitivities. What works in one district may not work a few hundred kilometres away. This diversity shapes consumption in ways that national playbooks often fail to capture.

Consumption here is strongly influenced by regional and local brands that have earned trust through familiarity and relevance. In categories such as staples, dairy, snacks, spices, and household essentials, local brands often outperform national ones because they align closely with local taste preferences, pack sizes, and budget thresholds. These brands are not discovered through advertising alone, but through years of presence in kirana stores, local wholesalers, and value-focused supermarkets.

For many households, these brands represent consistency and reliability rather than experimentation. They are part of everyday routines and have been validated over time by family members, neighbours, and shopkeepers. That trust translates directly into repeat purchases when these consumers move online.

Product discovery also looks different. Vernacular content drives engagement. Consumers follow regional creators, consume content in local languages,

The Future of Frozen and Processed Foods in India

Recent data indicates that the ready-to-cook category recorded a 58% growth in 2024—a pace that signals consumers have moved beyond initial hesitation and embraced the segment more confidently.

By Pranay Kumar Mishra



If you want to understand how India is changing, do not start with Parliament or Dalal Street. Start with the freezer section of a supermarket. Ten years ago, it was a narrow strip stocked with peas, corn, and the occasional ice cream tub.

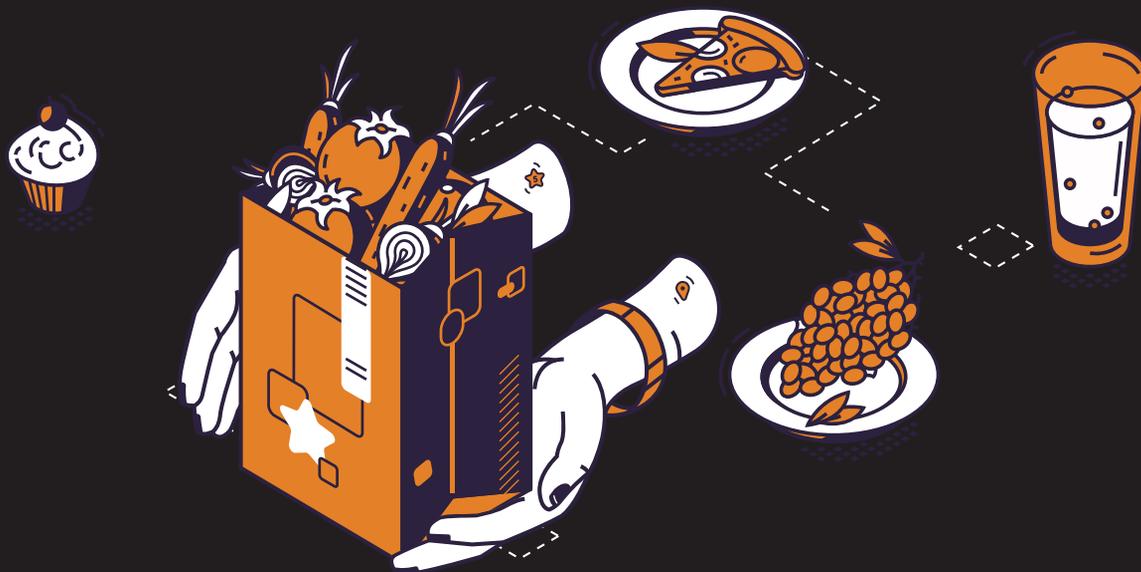
Today, it is an entire corridor. Parathas. Idlis. Kebabs. Marinated chicken. Momos. Cut vegetables. Ready gravies. It tells a simple story: Indian kitchens are under pressure, and the market has stepped in.

Recent data pointed out that the ready-to-cook category grew 58% in 2024. That is not incremental growth. That is a behaviour shift. When a segment expands at that pace, it usually means consumers have crossed a mental barrier.

The Real Reason: Time

The freezer is winning because time is scarce. Urban India works longer hours. Commutes stretch. Households are smaller. In many families, both partners work. Cooking remains culturally important, but the format is evolving. A frozen paratha is not seen as a compromise if it saves 20 minutes on a weeknight.

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