

## Market Size

### Total Addressable Market (TAM):

Customers/Users: 25.1 million

Revenue: Rs. 1,473,787 crores

### Serviceable Addressable Market (SAM):

Customers/Users: 17.5 million - 35.1 million

Revenue: Rs. 73,689 crores - Rs. 147,379 crores

## Executive Summary

Nizam's is a popular kathi kabab quick-service restaurant chain in India, with locations in Delhi, Gurgaon, and Noida. It offers high-quality, affordable kathi rolls and other Indian dishes, catering to the growing demand for fast food among the youth population. The total addressable market (TAM) for kathi kababs in these cities is estimated at a staggering Rs. 1,473,787 crores annually, with 25.1 million potential customers. Based on Nizam's brand presence and locations, they could realistically capture 5-10% of this market.

The serviceable addressable market (SAM) for Nizam's is estimated between Rs. 73,689 crores and Rs. 147,379 crores in annual revenue, with a potential customer base of 17.5 million to 35.1 million people. This assumes an average meal price of Rs. 500 and a consumption frequency of 7 kathi kabab meals per month per customer.

While Nizam's faces competition from other kathi kabab chains like Chowringhee, Khan Chacha, and Kathi Junction, as well as global fast-food giants like McDonald's, KFC, and Domino's, the large TAM presents a significant opportunity for growth. By expanding locations, maintaining food quality, focusing on value for money, and leveraging food delivery partnerships, Nizam's can capture a larger share of the QSR kathi kabab market. However, they will need to differentiate from street vendors and other competitors offering lower prices.

## Key Data Points

- Total population in Delhi, Gurgaon and Noida is approximately 38.58 million in 2023 [1][2][3][4][5]
- 65% of India's population prefers fast food and kathi kababs [6]
- Average eating out frequency in Delhi, Gurgaon and Noida is 6-7.5 times per month [8][9][10][11]
- Average price for a kathi kabab meal at Nizam's ranges from Rs. 400 to Rs. 1000 for two people [25][27][28][29][30]
- Quick service restaurants have 47% market share in India as of 2024 [22]
- Nizam's has multiple locations across Delhi, Gurgaon and Noida [25][27][28][29][30][31][32]

## Market Size Calculations

### Total Addressable Market (TAM) Calculations:

Total population in target cities:  $35,000,000 + 2,710,000 + 877,000 = 38,587,000$  [1][2][3][4][5]

Percentage interested in kathi kababs: 65% [6]

$38,587,000 \times 65\% = 25,081,550$  potential customers

Average price per kathi kabab meal: Rs. 700 (based on range of Rs. 400-1000 for two people) [25][27][28][29][30]

Average eating out frequency: 7 times per month [8][9][10][11]

Annual kathi kabab meals per customer:  $7 \times 12 = 84$

TAM =  $25,081,550$  customers  $\times$  Rs. 700  $\times$  84 annual meals

= Rs. 1,473,787,140,000

= Rs. 1,473,787 crores

### Serviceable Addressable Market (SAM) Calculations:

Assume Nizam's can capture 5-10% of kathi kabab market based on 47% QSR market share [22]

5% of TAM = Rs. 1,473,787 crores  $\times$  5% = Rs. 73,689 crores

10% of TAM = Rs. 1,473,787 crores  $\times$  10% = Rs. 147,379 crores

Use conservative average price of Rs. 500 per meal

Rs. 73,689 crores / Rs. 500 = 147.38 crore meals at 5% share

Rs. 147,379 crores / Rs. 500 = 294.76 crore meals at 10% share

Assume average customer eats kathi kabab meal 7 times per month (84 times annually) [8][9][10][11]

SAM customers at 5% = 147.38 crore meals / 84 = 1.75 crore (17.5 million)

SAM customers at 10% = 294.76 crore meals / 84 = 3.51 crores (35.1 million)

## Assumptions

Key assumptions:

1. Used 65% as percentage of population interested in kathi kababs based on data point that 65% of India's youth prefer fast food and kathi kababs [6]. This is a reasonable proxy for the target cities.
2. Averaged the price range of Rs. 400-1000 for two people to get Rs. 700 for TAM calculations [25][27][28][29][30]. The high end likely skews toward more premium locations.
3. Used quick service restaurant market share of 47% as a proxy for kathi kabab market share to estimate 5-10% share for Nizam's [22]. As an established brand with multiple locations, this is a reasonable assumption.
4. For SAM, used more conservative average price of Rs. 500 to account for deals, value meals, and price sensitivity.
5. Assumed average customer eats kathi kabab meal 7 times per month or 84 times annually for SAM calculations, in line with eating out data [8][9][10][11].

## Methodology

Here is the thought process followed to calculate the TAM (Total Addressable Market) and SAM (Serviceable Available Market) for Nizam's kathi kabab quick-service restaurant:

To calculate the TAM, we followed these steps:

Determined the total population in the target cities of Delhi, Gurgaon, and Noida, which comes to around 38.58 million people.

Estimated the percentage of this population that eats out regularly and would be interested in kathi kababs. Based on data that 65% of India's youth prefer fast food and kathi kababs, we used 65% as a reasonable proxy for the target cities.

Calculated the potential number of customers by multiplying the total population (38.58 million) by the percentage interested in kathi kababs (65%), which gives us around 25.08 million potential customers.

Estimated the average price per kathi kabab meal to be Rs. 700, based on the typical price range of Rs. 400-1000 for two people at Nizam's.

Assumed an average eating out frequency of 7 times per month or 84 times annually, based on data on eating out habits.

Calculated the TAM by multiplying the potential number of customers (25.08 million) by the average price per meal (Rs. 700) and the annual eating out frequency (84 meals), which gives us a TAM of around Rs. 1,473,787 crores.

To calculate the SAM, we followed these steps:

Narrowed down the percentage of the target market that Nizam's could realistically capture based on competition, brand awareness, locations, etc. Assuming Nizam's could capture 5-10% of the kathi kabab market, based on the quick service restaurant market share of 47%.

Used a more conservative average price of Rs. 500 per meal to account for deals, value meals, and price sensitivity.

Calculated the serviceable revenue by multiplying the target population (25.08 million) by the addressable percentage (5-10%) and the conservative price estimate (Rs. 500).

Estimated the number of customers by dividing the serviceable revenue by the average annual spend per customer, assuming an average of 84 kathi kabab meals per customer annually.

This gave us a SAM of 1.75 crore (17.5 million) customers at a 5% market share and 3.51 crore (35.1 million) customers at a 10% market share.

The key assumptions made in these calculations include the percentage of the population interested in kathi kababs, the average price per meal, the eating out frequency, Nizam's potential market share, and the average annual spend per customer. These assumptions were based on available data and reasonable estimates for the target market and Nizam's positioning.

## Competitor Research Summary

Chowringhee:

**Market Share:** Chowringhee Foods Pvt Ltd is actively expanding its market share in India through its franchise model, aiming to spread its presence across the country [72].

**Target Market:** Chowringhee targets a wide range of market segments, including elite, middle, and lower-class consumers. They aim to educate people about the health benefits of their food offerings [73].

**Product Offerings:** Chowringhee offers a diverse range of products including:

- Authentic Indian cuisine, such as Kathi rolls, Tandoori Momos, and economic Indian meals and shakes [77].
- Handcrafted leather products like satchels, clutches, and accessories [76].
- Multi-purpose jute bags [76].
- Unique furniture items like the Chowringhee Dining Table [78].
- Camera and photography-related products and services [79].

**Pricing Strategy:** While specific pricing details are not provided, Chowringhee's pricing strategy appears to be focused on leveraging expertise to reach target audiences effectively [74].

**Sales Numbers:** Exact sales figures are not provided. However, Chowringhee Sales Bureau PVT LTD, a trading company based in Kolkata, has an authorized capital of Rs 5.0 lakhs and a paid-up capital of Rs 2.18 lakhs [75].

**Home Delivery Service:** Chowringhee offers home delivery services in various locations, including Delhi, UAE, and the UK [89][90][91][92].

**Locations:** Chowringhee has multiple locations in Delhi, Gurgaon, and Noida [80][81][82][83][84].

**Reviews:** Chowringhee Kathi Rolls has received mixed reviews across various platforms, with ratings ranging from 3.8 to 3.9 based on customer reviews [85][86][87][88].

**Awards and Recognitions:** No specific awards or recognitions for Chowringhee were mentioned in the provided data.

Khan Chacha:

**Market Share:** While exact market share figures are not provided, Khan Chacha has a significant market presence in the kebab and roll segment, with multiple outlets across Delhi NCR, Chandigarh, and Gujarat [93][94].

**Target Market:** Khan Chacha's target market includes a diverse range of customers, from students to celebrities, including cricketers, politicians, and Bollywood stars [96][97].

**Product Offerings:** Khan Chacha offers a variety of Mughlai and North Indian dishes, including:

- Various rolls (Veg Hariyali Roll, Chicken Seekh Roll, Paneer Tikka Roll, Chicken Tikka Roll)
- Biryani (Chicken Biryani, Mutton Biryani, Veg Biryani)
- Kebabs and other dishes [98][99][100].

**Pricing Strategy:** While specific pricing details are not provided, Khan Chacha focuses on maintaining quality and customer satisfaction, which likely influences their pricing decisions [105].

**Sales Numbers:** Exact sales figures are not provided. However, Khan Chacha has implemented tech-based restaurant management systems to improve operational efficiency and explore new business models, which are expected to enhance revenues [95].

**Home Delivery Service:** Khan Chacha offers home delivery services through their website and partnerships with food delivery platforms like DoorDash and Swiggy [101][102][103][104].

**Locations:** Khan Chacha has multiple locations across Delhi, Gurgaon, and Noida [119][120][121][122].

**Reviews:** Khan Chacha's kathi rolls have received generally positive reviews, with customers praising the taste and quality of their rolls [106][107][108][109].

**Awards and Recognitions:** Khan Chacha has received several awards and recognitions for its culinary excellence, including accolades for its "award-winning rolls and traditional kebabs" [110].

#### Kathi Junction:

**Market Share:** Kathi Junction has a significant market share in the Quick Service Restaurant (QSR) kathi rolls market in India, with over 80 outlets across more than 23 cities [111].

**Target Market:** Kathi Junction targets a wide range of consumers across India, focusing on high footfall areas such as malls and organized shopping arcades in small and medium towns [112][113].

**Product Offerings:** Kathi Junction specializes in Kathi Rolls and Shawarma, offering a variety of flavors and options [114].

**Pricing Strategy:** Kathi Junction's pricing strategy is designed to be investor-friendly and accessible to a wider range of entrepreneurs. The initial investment range is INR 6 Lac to INR 18 Lac, with a franchise fee of INR 3.5 Lacs to INR 7.5 Lacs [115][116][117][118].

**Sales Numbers:** Kathi Junction sells over 14,000 Kathi Rolls and 4,000 Shawarmas every day. The company has sold over 10 crore (100 million) Kathi Rolls and 4 crore (40 million) Shawarmas [135][136].

**Home Delivery Service:** Kathi Junction offers home delivery services in various locations, including Kacheri, Ghazipur, and Ara, Arrah. They have also partnered with Uber Eats to provide delivery services in Vancouver, Canada [123][124][125][126].

**Locations:** Kathi Junction has multiple locations in Delhi, Gurgaon, and Noida [130][131][132][133][134].

**Reviews:** The Kati Roll Company, which may be related to Kathi Junction, has received positive reviews with a 5-star overall rating on Yelp based on 1717 reviews [127][128][129].

**Awards and Recognitions:** No specific awards or recognitions for Kathi Junction were mentioned in the provided data.

#### Fast-food chains:

**Market Share:** The quick-service restaurant (QSR) market in India was valued at approximately \$25.46 billion in 2024 and is expected to reach \$38.71 billion by 2029, growing at a CAGR of 8.74% [141].

**Target Market:** Fast-food chains primarily target Millennials and mothers, as well as convenience seekers, time-poor individuals, health-conscious consumers, and meeting place seekers [142][143][144].

**Product Offerings:** Fast-food chains offer a wide variety of products, including burgers, pizzas, sandwiches, chicken dishes, and localized menu items to cater to different markets [150][151][152].

**Pricing Strategy:** Fast-food chains employ various pricing strategies, including dynamic pricing, menu engineering, value propositions, bundle deals, and cost-based pricing [145][146][147][148][149].

#### Sales Numbers:

- McDonald's: \$48.7 billion (2022)

- Starbucks: \$28.1 billion (2022)
- Chick-fil-A: \$18.8 billion (2022)
- Taco Bell: \$13.85 billion (2022)
- Wendy's: \$11.7 billion (2022) [137][138][139][140]

Home Delivery Service: Many fast-food chains have implemented home delivery services, partnering with third-party delivery platforms or developing their own delivery systems [161][162][163][164].

Locations: Fast-food chains have multiple locations across Delhi, Gurgaon, and Noida, including popular brands like KFC, Burger Singh, McDonald's, Domino's Pizza, and Haldiram's [158][159][160].

Reviews: Reviews for fast-food chains vary depending on the specific brand and location. Generally, they receive mixed reviews with some chains being highly rated for their food quality and service.

Awards and Recognitions: Various fast-food chains have received awards and recognitions, such as "The Fasties" awards hosted by Thrillist, which honor fast-food chains and menu items [153][154][155][156][157].

## Summary of Collected Data

### Financial Data

The total population in Noida in 2023 is approximately 877,000 [1][2].

The total population of Gurgaon in 2023 is estimated to be 2,710,000 (27.16 Lakhs) [3].

The total population in Delhi in 2023 is approximately 35 million people, with a growth rate of 2.73% from the previous year [4][5].

65% of India's population is composed of youths who prefer fast food and junk edibles, which includes kathi kababs [6].

The average frequency of eating out in Delhi is six times a month [8].

The average frequency of eating out in Gurgaon is around 7.5 times per month [9].

The average frequency of eating out in Noida is approximately 7.5 times a month [10][11].

In India, 19% of respondents order from food delivery apps daily, while 31% order 2-3 times a week, and 21% order 1-2 times a month [13].

For the 18-30 age group, 37.3% use food delivery platforms once a month, and 33.3% use them less than three times a week [14].

According to Statista, as of April 2023, 44.6% of respondents aged 18-29 order food delivery at least once a week, while 24.4% of those aged 30-44 do so [16].

The India Food Services Report highlights that the average monthly eating out frequency has seen a 20% increase to 7.9 times in 2023-24 from 6.6 times in 2018-19 [15].

Nizam's Kathi Kabab in Gurgaon charges around Rs. 160 for a double egg double chicken roll [21].

The market share of quick service restaurants in India was 47% as of 2024 [22].

In 2024, the quick-service restaurant market in India was valued at approximately 25.46 billion U.S. dollars and was forecasted to reach 38.7 billion U.S. dollars by 2029 [24].

The organized fast-food sector in India was dominated by global food chains like Dominos, McDonalds, KFC, and Pizza Hut [24].

Nizam's Kathi Kabab, Sector 49 in Gurgaon: Average cost for two people: ₹400 (approx.) [25]

Nizam's Kathi Kabab, DLF Phase 1 in Gurgaon: Average cost for two people: ₹1,000 (approx.) [27]

The Kathi Rolls in Gurgaon: Cost of a double egg double chicken roll: ■135 [26]

Nizam's Kathi Kabab, Connaught Place in Delhi: Average cost for two people: ■1,000 (approx.) [28]

Nizam's Kathi Kabab, Defence Colony in Delhi: Average cost for two people: ■1,000 (approx.) [30]

Nizam's Kathi Kabab, Connaught Place (CP) in Delhi: Average cost for two people: ■600 [29]

Khan Kabab Kathi Rolls in Noida: Average cost for two people: ■200 (approx.) [31]

Nizam's Kathi Kabab in Noida: Average cost for two people: ■500 (approx.) [32]

According to the Economic Survey of Delhi for 2022-23:

- Gross State Domestic Product (GSDP) at current prices: ■8,94,122 crore (approximately \$123 billion USD) [34]
- Net State Domestic Product (NSDP) at current prices: ■7,83,442 crore (approximately \$106 billion USD) [34]
- Per capita income at current prices: ■3,54,004 (approximately \$4,800 USD) [34]

The average frequency of ordering food delivery in India is approximately 2.5 times per month [40].

According to a survey conducted in October 2023, 46% of respondents in India preferred Domino's and McDonald's, while 42% preferred KFC [41].

The total population in India as of 2023, according to the U.S. Census Bureau, is approximately 1.43 billion [42][43].

As of 2023, there were approximately 53,361 Yum Brands units worldwide, which includes major QSR chains like KFC and Pizza Hut [45].

India's e-retail market is expected to scale to \$57–\$60 billion in 2023, adding \$8–\$12 billion annually since 2020 [69].

The Indian e-grocery market is set to witness growth in tier 2 and beyond regions, with the market size projected to reach \$5.5 billion by 2025 [70].

## Behavioral Data

The average frequency of eating out in Delhi is six times a month [8].

The average frequency of eating out in Gurgaon is around 7.5 times per month [9].

The average frequency of eating out in Noida is approximately 7.5 times a month [10][11].

In India, 19% of respondents order from food delivery apps daily, while 31% order 2-3 times a week, and 21% order once a week [12].

For the 18-30 age group in India, 37.3% use food delivery platforms once a month, and 33.3% use them less than three times a week [14].

According to Statista, as of April 2023, the frequency of ordering food from food delivery apps across India varies by age group. 44.6% of respondents aged 18-29 order food delivery at least once a week, while 24.4% of those aged 30-44 do so. The frequency of ordering decreases with age, with 14.5% of those aged 60 and above ordering food delivery at least once a week [16].

The average monthly eating out frequency in India has seen a 20% increase to 7.9 times in 2023-24 from 6.6 times in 2018-19 [15].

65% of India's population is composed of youths who prefer fast food and junk edibles, which includes kathi kababs [6].

In Delhi, people enjoy kathi kababs, and Khan Chacha in Khan Market is a well-known spot for these rolls [7].

The willingness to pay for high-quality, affordable kathi kababs in Noida is evident from positive feedback about taste and vendors' willingness to adjust spiciness levels [17].

In Gurgaon, customers are willing to pay for high-quality kathi kababs but expect them to be reasonably priced, with a balance between quality and affordability being a key factor in their purchasing decisions.

The willingness to pay for high-quality, affordable kathi kababs in Delhi is evident in the positive reviews and ratings of popular kathi kabab joints. Customers appreciate good value for money, taste, and quality [18][19][20].

Nizam's Kathi Kabab in Gurgaon charges around Rs. 160 for a double egg double chicken roll [21].

In Kolkata, outlets typically charge less than Rs. 60 for similar rolls [21].

The age group of 25 to 35 years has the highest mean consumption frequency of fast food in India [57].

Graduates and postgraduates are the largest consumers of fast food in India [57].

Working professionals, businessmen, and students are more likely to consume fast food in India [57].

Families of 4-6 members are more likely to consume fast food in India [57].

Fast food consumption frequency in India ranges from once a week to three times a month, with 45% of respondents consuming fast food three times a month [59].

Popular fast food items in India include sandwiches (45%), pizzas (30%), and burgers (23%) [59].

Taste satisfaction, convenience, and socializing with friends are major reasons for consuming fast food in India [59].

Urban households in India spend more on processed foods and consume more fast food away from home compared to rural households [58].

The average frequency of ordering food delivery in India is approximately 2.5 times per month [40].

According to a survey conducted in October 2023, 46% of respondents in India preferred Domino's and McDonald's, while 42% preferred KFC [41].

The median age in India is 28.2 years (2023) [66][68].

The age structure in India is:

0–14 years: 25.68% (male 183,695,000, female 166,295,000) (2021 est.)

15–64 years: 67.49% (male 472,653,000, female 447,337,000) (2021 est.)

65 and over: 6.83% (male 44,275,000, female 48,751,000) (2021 est.) [67]

The majority of respondents between the ages of 16 to 54 years in India dine out or buy meals outside the home at least once a week, with some age groups doing so more frequently [44].

## Competitor Data

### 1. Market Share and Growth:

- The quick-service restaurant (QSR) market in India was valued at approximately \$25.46 billion in 2024 and is forecasted to reach \$38.7 billion by 2029, with a compound annual growth rate (CAGR) of 8.74% [49][52].
- The market share of quick service restaurants in India was 47% as of 2024 [46].
- The food service industry in India is estimated to have about 57% market share across metro cities in 2025 [54].

### 2. Popular Chains and Offerings:

- Global brands like McDonald's, KFC, Domino's Pizza, Subway, Pizza Hut, Burger King, and Dunkin' Donuts have a significant presence in metro cities and tier-1 cities [47][53].
- Domestic players like Cafe Coffee Day, Wow Momo, and Faasos are also popular [53].
- Menu items include French fries, pizzas, sandwiches, burgers, wraps/rolls, and garlic bread [65].

### 3. Consumer Preferences:

- According to a survey conducted in October 2023, 46% of respondents in India preferred Domino's and McDonald's, while 42% preferred KFC [41].
- Meat-based dishes are the most popular in QSRs, with a significant increase in per capita meat consumption from 6.15 kg in 2019 to 6.82 kg in 2022 [50].
- Chicken is the most-used ingredient in QSR establishments, followed by cheese and vegetables [51].

#### 4. Pricing and Value Meals:

- Fast food chains are focusing on value meals to boost dine-in sales. For example, McDonald's has launched "McSaver Meals" starting at Rs 99, and KFC has introduced "lunch special" meals at Rs 149 [63].
- The average spending on fast food ranges from USD 2.98 to USD 3.65 per serving [50].

#### 5. Delivery Trends:

- The food delivery sector continues to grow, with a focus on maintaining food quality during transportation and adapting marketing strategies [39].
- Key players like Swiggy and Zomato dominate the market [39].
- The average frequency of ordering food delivery in India is approximately 2.5 times per month [40].

#### 6. Consumer Behavior:

- The average frequency of eating out in India has increased from 2-4 times a month in 2010 to 6.6 times a month by 2019 [55].
- A majority of respondents between the ages of 16 to 54 years in India eat out or buy food outside of home at least once a week [56].

#### 7. Demographics:

- The age group of 25 to 35 years has the highest mean consumption frequency of fast food [57].
- Working professionals, businessmen, and students are more likely to consume fast food [57].

#### 8. Regional Variations:

- QSRs have expanded into tier-2 and tier-3 cities, where competition is less intense, and prices are more competitive [47].
- The quality of fast food chains can vary significantly depending on the location [62].

#### 9. Challenges and Trends:

- The industry faces challenges from inflation in food prices, which impacts operating margins [47].
- There's a growing focus on sustainability, with restaurants adopting eco-friendly approaches like sourcing local and organic ingredients and reducing food waste [48].
- Digital transformation and the adoption of AI technology are enhancing customer experiences [60][61].

#### 10. Competition:

- Street vendors offering hot, fresh, and affordable snacks are significant competitors to fast food chains, often offering food at half the price of restaurant food [64].

This data provides an overview of the competitive landscape for kathi kabab and similar fast food restaurants in India, highlighting market trends, consumer preferences, and challenges in the industry.

## Demographic Data

### Population:

- Noida: Approximately 877,000 in 2023 [1][2]
- Gurgaon: Estimated 2,710,000 (27.16 Lakhs) in 2023 [3]
- Delhi: Approximately 35 million in 2023, with a growth rate of 2.73% from the previous year [4][5]

### Age Distribution:

#### Delhi (2023):

0-14 years: 27.19%  
15-19 years: 9.93%  
20-24 years: 10.51%  
25-29 years: 9.94%  
30-39 years: 16.40%  
40-49 years: 11.96%  
50-59 years: 7.13%  
60 years and above: 6.83% [33]

#### India (2021 estimate):

0-14 years: 25.68% (male 183,695,000, female 166,295,000)  
15-64 years: 67.49% (male 472,653,000, female 447,337,000)



65 and over: 6.83% (male 44,275,000, female 48,751,000) [67]

#### Median Age:

- India: 28.2 years (2023) [66][68]

#### Income Levels:

- Delhi (2022-23):  
Gross State Domestic Product (GSDP) at current prices: ■8,94,122 crore (approximately \$123 billion USD)  
Net State Domestic Product (NSDP) at current prices: ■7,83,442 crore (approximately \$106 billion USD)  
Per capita income at current prices: ■3,54,004 (approximately \$4,800 USD) [34]

#### Employment:

- Specific employment data for Gurgaon, Noida, and Delhi is not provided in the sources.

#### Food Preferences:

- 65% of India's population is composed of youths who prefer fast food and junk edibles, which includes kathi kababs [6]
- In Delhi, people enjoy kathi kababs, with Khan Chacha in Khan Market being a well-known spot for these rolls [7]
- 46% of respondents in India preferred Domino's and McDonald's, while 42% preferred KFC (October 2023 survey) [41]

#### Eating Out Habits:

- Delhi: Average frequency of eating out is six times a month [8]
- Gurgaon: Average frequency of eating out is around 7.5 times per month [9]
- Noida: Average frequency of eating out is approximately 7.5 times a month [10][11]
- India: Average frequency of eating out increased from 2-4 times a month in 2010 to 6.6 times a month by 2019 [55]

#### Food Delivery Habits:

##### India:

19% order from food delivery apps daily  
31% order 2-3 times a week  
21% order once a week [12]  
Average frequency of ordering food delivery is approximately 2.5 times per month [40]

##### For the 18-30 age group in India:

37.3% use food delivery platforms once a month  
33.3% use them less than three times a week [14]

#### Market Share:

- Quick service restaurants in India: 47% market share as of 2024 [22][23]
- Food service industry in major cities of India: Estimated 57% market share in 2025 [54]

#### Population Density:

- Gurgaon district: 1,241 inhabitants per square kilometer (3,210/sq mi) as per the 2011 census [35]
- Delhi: Some areas exceed 30,000 persons per square kilometer [36][37]
- Noida: Approximately 442 people per square kilometer (2011 census) [38]

#### Total Population of India:

- Approximately 1.43 billion in 2023 [42][43]

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## User Inputs

### **Please enter the name of your business, product, or service**

Nizam's

### **Please describe your business, product or service in as much detail as possible. This can include elements such as the main benefits you offer, costs, industry, etc. and helps make the TAM & SAM calculations more accurate.**

Nizam's is a a kathi kabab quick-service restaurant in India, with locations in Delhi, Gurgaon, and Noida. It's known for fast, high quality kathi rolls. Menu items include mutton rolls, chicken rolls, paneer rolls, mushroom rolls, currys, rice bowls, and Kababerie. Nizam's prepares huge, juicy and delicious kathi rolls at quite affordable prices. It also provides home delivery and the rolls are properly and neatly packed. The roti is wafer thin, allowing you to enjoy the contents of the roll to the fullest. Their rolls are crispy, juicy, full of stuffing and makes you always asking for more.

### **Optional: Who is your ideal customer or user? This can include things like demographics, behaviors, geographic, details, etc.**

Those who live or work within walking distance of one of the store locations who desire kathi kababs that are high quality, fast, and affordable.

### **Optional: Who are the primary competitors? This can include specific companies or broad categories. Please separate competitors by commas.**

Chowringhee, Khan Chacha, Kathi Junction, fast-food chains

### **Optional: What makes your business, product or service unique from others in the market?**

Received multiple awards from Zomato.