



STATE REPORT · 2026 EDITION

Maharashtra, mapped.

639 dark stores mapped across Maharashtra - the only Indian state with two genuinely mature quick-commerce markets, where Mumbai's suburb wars meet Pune's rapid rise and the rest of the state trails far behind.

SAMPLE

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01

Executive summary

The headline numbers and what they mean.

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Maharashtra hosts **639 operational dark stores** across **40 cities** and **21 districts**, based on our verified March 2026 snapshot. This chapter surfaces the seven or eight findings that, in our judgement, matter most to journalists, investors, and operators thinking about this state.

Maharashtra is the only top-10 state with two genuinely mature quick-commerce markets. Mumbai Metropolitan Region holds 340+ stores and Pune-Pimpri-Chinchwad holds 185+; together they account for 82% of the state's footprint. The unusual thing is not that two cities dominate - most states have a primate city - but that both markets have all three operators competing at scale, with distinct competitive dynamics that would be separate state reports in any other country.

639

DARK STORES

40

CITIES COVERED

278

HYPERLOCAL AREAS

21

DISTRICTS WITH STORES

KEY FINDINGS

- 01 Maharashtra hosts 639 dark stores across 40 cities, making it the 1st largest in India's state-level quick-commerce network.

- 02 Blinkit leads the state with 45.4% market share (290 stores), followed by 30.4% Zepto and 24.3% Swiggy Instamart.

- 03 Mumbai alone accounts for 36.3% of the state's dark store base (232 stores), leaving 39 other cities competing for the remaining 407.

- 04 The gap between Mumbai and Pune (180 stores) is 1x — one of the sharpest primate-city ratios in Indian quick commerce.

- 05 4 cities in Maharashtra with population above 500,000 have one or zero mapped dark stores (Pimpri Chinchwad, Bhiwandi, Akola, Jalgaon) — a large under-addressed addressable market.

- 06 Blinkit operates exclusively in 19 cities where no competing platform has yet entered.

- 07 4 Maharashtra cities have all three major platforms operating head-to-head, 11 have two-way competition.

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- 08 13,419-20,448 people are employed across the state's dark-store and delivery workforce, implying 21,279-42,557 new hires every year to offset industry-norm attrition.
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SAMPLE PREVIEW ENDS HERE

Continue with the full Maharashtra report.

This preview shows 3 of 28 pages. The full report includes:

- Full state density map with all 639 stores plotted
- Top 20 cities ranked with population, area coverage, and density
- Platform competition analysis for every major city
- Underserved markets: 8-city expansion priority list with rationale
- Workforce analysis: pickers, delivery partners, annual hiring volume
- District-level breakdown across all 21 districts
- Full methodology, data limitations, and appendix

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