



STATE REPORT · 2026 EDITION

# Punjab, mapped.

*141 dark stores mapped across Punjab - the most evenly distributed Indian state in the top 10, with no single city exceeding 20% of state stores and the Chandigarh tricity effectively functioning as Punjab's quick-commerce capital.*

SAMPLE

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PUBLISHED

April 2026

BY

QuickCommerceMap

EDITION

2026.1

REPORT ID

QCM-PUNJAB-2026-01

# 01

## Executive summary

*The headline numbers and what they mean.*

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SAMPLE

**P**unjab hosts **141 operational dark stores** across **25 cities** and **16 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.

*Punjab is the most evenly distributed top-10 state in Indian quick commerce. Ludhiana leads at 19% of state stores, but the Chandigarh tricity cluster (Mohali + SAS Nagar + Kharar + Zirakpur + New Chandigarh) collectively holds 53 stores - 38% of Punjab's total - and functions as a single operational market that happens to cross the Punjab-Haryana-Chandigarh border. That tricity core, not Ludhiana or Amritsar, is where the real Punjab quick-commerce story is happening.*

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**141**

DARK STORES

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**25**

CITIES COVERED

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**104**

HYPERLOCAL AREAS

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**16**

DISTRICTS WITH STORES

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**KEY FINDINGS**

- 01** Punjab hosts 141 dark stores across 25 cities, making it the 10th largest in India's state-level quick-commerce network.

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- 02** Blinkit leads the state with 59.6% market share (84 stores), followed by 22% Zepto and 18.4% Swiggy Instamart.

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- 03** Ludhiana alone accounts for 19.1% of the state's dark store base (27 stores), leaving 24 other cities competing for the remaining 114.

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- 04** The gap between Ludhiana and Mohali (20 stores) is 1x – one of the sharpest primate-city ratios in Indian quick commerce.

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- 05** Blinkit operates exclusively in 16 cities where no competing platform has yet entered.

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- 06** 4 Punjab cities have all three major platforms operating head-to-head, 5 have two-way competition.

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- 07** 2,961-4,512 people are employed across the state's dark-store and delivery workforce, implying 4,695-9,391 new hires every year to offset industry-norm attrition.

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SAMPLE PREVIEW ENDS HERE

# Continue with the full Punjab report.

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

- Full state density map with all 141 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 16 districts
- Full methodology, data limitations, and appendix

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