



STATE REPORT · 2026 EDITION

# Tamil Nadu, mapped.

*281 dark stores mapped across Tamil Nadu - the only Phase 1 state where Swiggy Instamart is the #1 operator, built on Chennai's outsized platform diversity and a tier-2 long tail that is just beginning to attract platform investment.*

SAMPLE

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BY

QuickCommerceMap

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# 01

## Executive summary

*The headline numbers and what they mean.*

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**T**amil Nadu hosts **281 operational dark stores** across **21 cities** and **18 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.

*Tamil Nadu is Swiggy Instamart's strongest state. With 36.7% market share - 103 of the state's 281 stores - Swiggy is the #1 quick-commerce operator in Tamil Nadu, ahead of Zepto (34.5%) and Blinkit (28.8%). In every other top-10 state either Blinkit or Zepto leads. The reason is structural: Tamil Nadu is Swiggy's home state, Chennai is Swiggy's second-largest food-delivery market, and the attached-rider economics in Tamil Nadu are uniquely favourable to Swiggy Instamart's operating model.*

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**281**

DARK STORES

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**21**

CITIES COVERED

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**128**

HYPERLOCAL AREAS

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**18**

DISTRICTS WITH STORES

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**KEY FINDINGS**

- 01** Tamil Nadu hosts 281 dark stores across 21 cities, making it the 6th largest in India's state-level quick-commerce network.

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- 02** Swiggy instamart leads the state with 36.7% market share (103 stores), followed by 34.5% Zepto and 28.8% Blinkit.

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- 03** Chennai alone accounts for 74.4% of the state's dark store base (209 stores), leaving 20 other cities competing for the remaining 72.

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- 04** The gap between Chennai and Coimbatore (24 stores) is 9x – one of the sharpest primate-city ratios in Indian quick commerce.

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- 05** 2 cities in Tamil Nadu with population above 500,000 have one or zero mapped dark stores (Tirunelveli, Thoothukkudi) – a large under-addressed addressable market.

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- 06** Swiggy instamart operates exclusively in 10 cities where no competing platform has yet entered.

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- 07** 4 Tamil Nadu cities have all three major platforms operating head-to-head, 4 have two-way competition.

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- 08** 5,901-8,992 people are employed across the state's dark-store and delivery workforce, imp-

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lying 9,357-18,715 new hires every year to offset industry-norm attrition.

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SAMPLE PREVIEW ENDS HERE

# Continue with the full Tamil Nadu report.

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

- Full state density map with all 281 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 18 districts
- Full methodology, data limitations, and appendix

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