



STATE REPORT · 2026 EDITION

# Telangana, mapped.

*310 dark stores mapped across Telangana - the only major Indian state where Zepto holds #1 market share, built on a 276-store Hyderabad footprint that drives 89% of state activity while the rest of Telangana remains barely touched.*

SAMPLE

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# 01

## Executive summary

*The headline numbers and what they mean.*

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SAMPLE

**T**elangana hosts **310 operational dark stores** across **7 cities** and **5 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.

*Telangana is Zepto's flagship state. Hyderabad is the only tier-1 metro where Zepto is the #1 operator - 112 stores versus Blinkit's 90 and Swiggy's 74 - and the only large Indian metro where the three-way competition tilts decisively away from Blinkit. The rest of Telangana is nearly absent from quick commerce: Hyderabad holds 276 of 310 stores (89%), a concentration ratio sharper than even Karnataka's Bangalore story. Telangana is effectively a Hyderabad report with a thin tier-2 appendix.*

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# 310

DARK STORES

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# 7

CITIES COVERED

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# 80

HYPERLOCAL AREAS

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# 5

DISTRICTS WITH STORES

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## KEY FINDINGS

- 01 Telangana hosts 310 dark stores across 7 cities, making it the 5th largest in India's state-level quick-commerce network.
  - 02 Zepto leads the state with 38.1% market share (118 stores), followed by 38.1% Zepto and 28.7% Swiggy Instamart.
  - 03 Hyderabad alone accounts for 89% of the state's dark store base (276 stores), leaving 6 other cities competing for the remaining 34.
  - 04 The gap between Hyderabad and Secunderabad (13 stores) is 21x — one of the sharpest primate-city ratios in Indian quick commerce.
  - 05 Swiggy instamart operates exclusively in 1 city where no competing platform has yet entered.
  - 06 3 Telangana cities have all three major platforms operating head-to-head, 2 have two-way competition.
  - 07 6,510-9,920 people are employed across the state's dark-store and delivery workforce, implying 10,323-20,646 new hires every year to offset industry-norm attrition.
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SAMPLE PREVIEW ENDS HERE

# Continue with the full Telangana report.

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

- Full state density map with all 310 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 5 districts
- Full methodology, data limitations, and appendix

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