Dark stores set to triple as Q-commerce redraws India's retail map

Quick commerce is pushing a rapid expansion of dark stores, reshaping last-mile logistics across Indian cities

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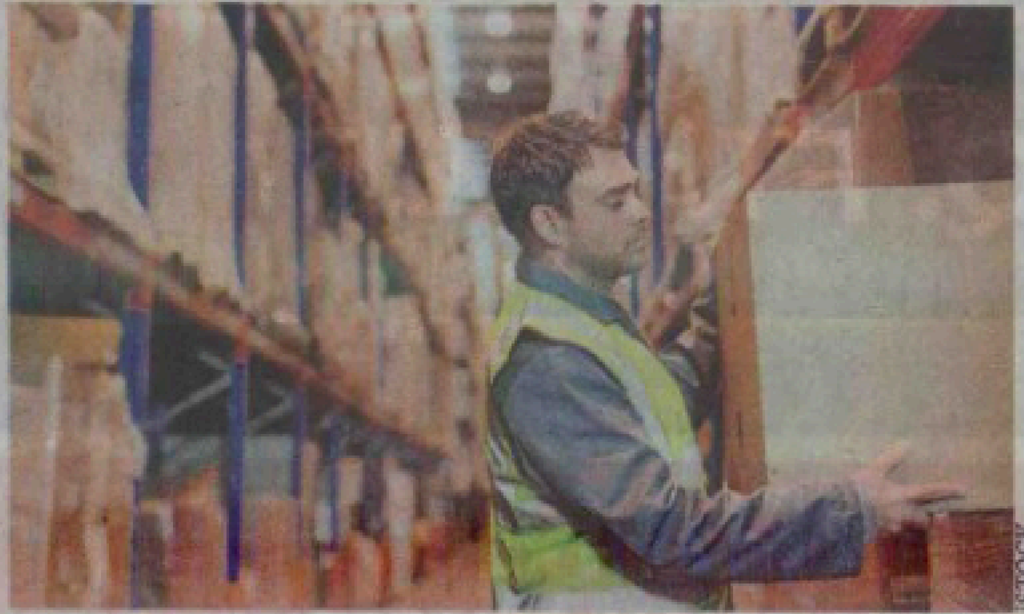
India's quick commerce (Q-Commerce) boom is set to transform the country's retail and logistics landscape, with the number of dark stores expected to triple to around 7,500 by 2030, according to a Savills India report titled 'Q-Commerce Growth: Dark Stores Shaping the Future of Retail'. The growth is being driven by rising consumer demand for ultra-fast deliveries and the widening reach of app-based retail beyond groceries.

Dark stores are dedicated fulfilment centres designed exclusively for online orders and closed to walk-in customers. Their rapid expansion reflects the hyper-local model of Q-Commerce, where consumers increasingly expect essentials and convenience products to be delivered within minutes rather than hours or days. To meet these expectations, operators are focusing on dense networks of smaller, strategically located facilities closer to residential catchments.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While groceries and daily essentials remain the backbone of Q-Commerce, platforms are steadily moving into higher-value categories such as premium personal care, lifestyle products and time-critical medical supplies. This shift is increasing average order values and strengthening the business case for more sophisticated dark store formats.

Looking ahead to 2030, the report expects dark store demand to grow nearly threefold, requiring more specialised design, including efficient layouts, temperature-controlled storage and automation-ready facilities. Emerging trends such as dual-use formats combining dark stores with cloud kitchens, along with drone-based and AI-enabled last-mile deliveries, are also likely to gain traction.

Prashant Sharma, president, NAREDCO Maharashtra, shares, "The projected tripling of dark stores by 2030 reflects the growing maturity of India's Q-commerce ecosystem and its increasing reliance on efficient last-mile infrastructure, calling for a more structured and policy-aligned approach to developing dark stores as a real estate asset class."

As of October 2025, India has an estimated 2,525 dark stores spread across eight tier-I cities and more than 100 tier-II and III cities, together occupying about 13 million sq ft of space. Tier-I markets account for 68 per cent of the total store count and around nine million sq ft of area, underlining their continued dominance in organised quick commerce infrastructure. However, tier-II and III cities are emerging as meaningful growth engines, already contributing 32 per cent of stores with four million sq ft of space.

Srinivas N, managing director, industrial and logistics, Savills India, shares, "Q-Commerce is rapidly evolving beyond its initial focus on groceries, food and daily essentials. Tier-I and II cities will lead this expansion, while tier-III cities will emerge as high-potential markets, with suburban and secondary micro-markets balancing cost and accessibility."

At a city level, the NCR leads the market, hosting the highest concentration of dark stores due to its vast urban spread, high population density and strong purchasing power. Bengaluru follows closely, supported by its tech-savvy workforce and deep e-commerce penetration.

For real estate developers and investors, the relatively low level of organised supply presents an opportunity to enter early and build assets aligned with the evolving needs of Q-Commerce operators, as speed and proximity become central to retail success.