



Report

APAC Market Insights: **Food & Dining Apps** and Brands **2025**



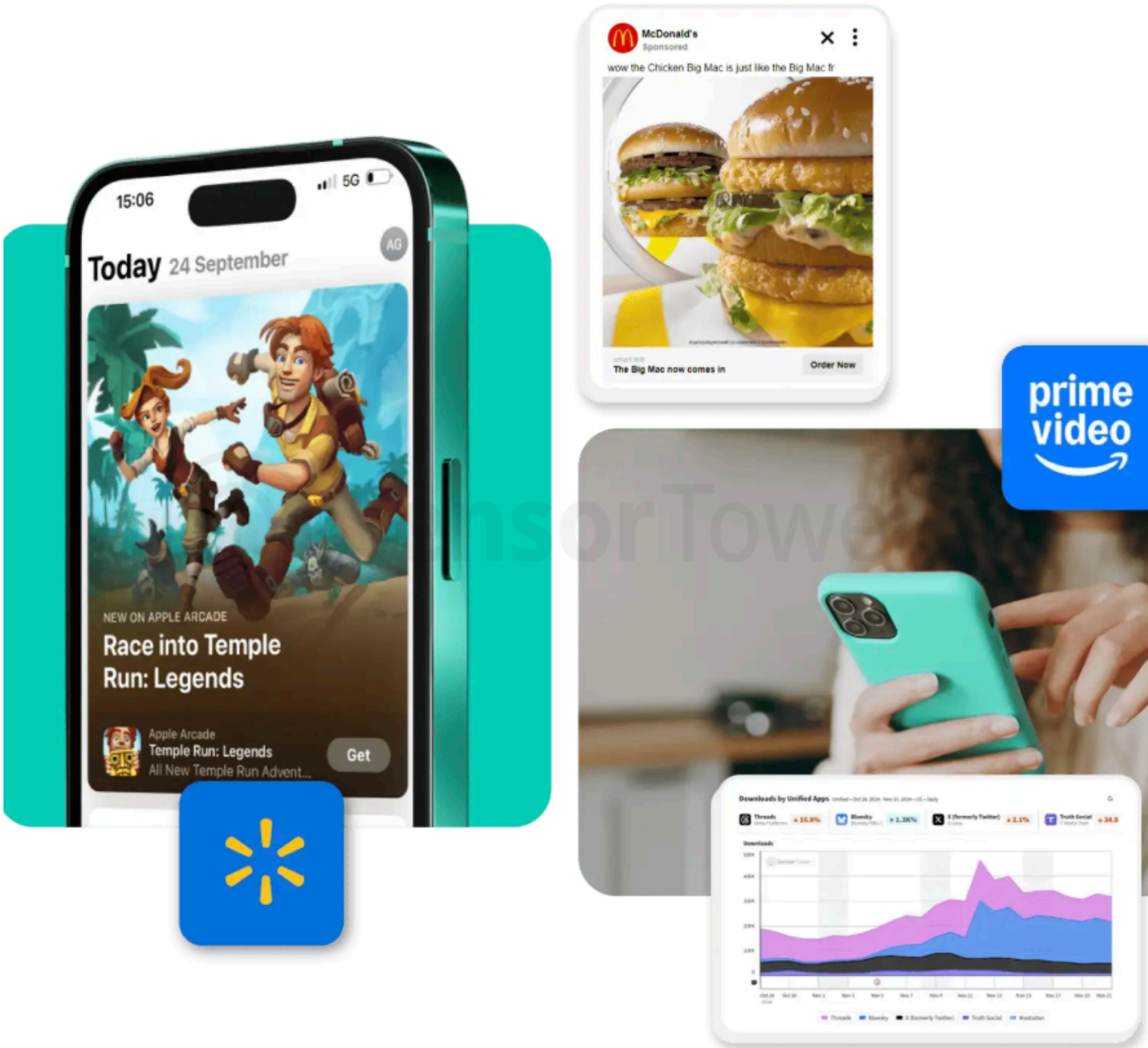
About Sensor Tower

Sensor Tower is the leading source of mobile app, digital advertising, retail media, and audience insights for the largest brands and app publishers across the globe.

With a mission to measure the world’s digital economy, Sensor Tower’s award-winning platform delivers unmatched visibility into the mobile app and digital ecosystem, empowering organizations to stay ahead of changing market dynamics and make informed, strategic decisions.





Founded in 2013, Sensor Tower’s mobile app insights have helped marketers, app, and game developers demystify the mobile app landscape with visibility into usage, engagement, and paid acquisition strategies. Today, Sensor Tower’s digital market insights platform has expanded to include Audience, Retail Media, and Pathmatics Digital Advertising Insights, helping brands and advertisers understand their competitor’s advertising strategies and audiences across web, social, and mobile.

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Business Inquiries : sales@sensortower.com



Sensor Tower | Our Customers

Top publishers trust Sensor Tower insights to grow their business.

L'ORÉAL		Google			Disney
petco	HERSHEY	amazon	ROVIO	DOORDASH	depop
Walmart	7 ELEVEN	Microsoft	SEGA	dyson	SONY
fetch REWARDS	Pizza Hut	Meta	OUTFIT7	Gett.	ByteDance
Alibaba	POPeYES	Tencent 腾讯	WARNER BROS. GAMES	P&G	NBA
CVS Health	Domino's	Johnson & Johnson		Welch's	Revolut

Note: Top publishers by app store revenue | Source: Sensor Tower

Sensor Tower Solutions



Sensor Tower **App Performance Insights**

**For those who need visibility
into the mobile app ecosystem.**

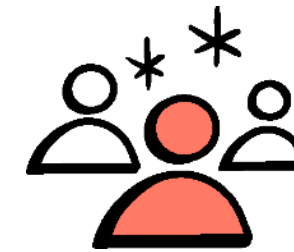
Enjoy insight into: app rankings, downloads, and revenue; active users, demographics, retention, sessions, and time spent; app ratings and reviews, keywords, search ads, and more.



Sensor Tower **App Advertising Insights**

**For those who need visibility
into paid user acquisition
strategies.**

Enjoy insight into: global and regional share of voice (SOV) across apps and the biggest mobile app ad networks, top advertisers, publishers, creatives, and more.



Sensor Tower **Audience Insights**

**For those who need visibility
into your existing, competitor,
and potential new audiences.**

Enjoy insight into: which apps consumers are actually interacting with (app engagement) AND which ads they're seeing (ad exposure).

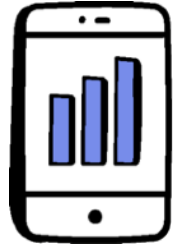


Sensor Tower **Pathmatics Digital Advertising Insights**

**For those who need visibility
into the digital ad ecosystem.**

Gain insight into: ads served, spend and impression estimates, SOV, and more across key channels, like: Facebook, Instagram, X (formerly Twitter), OTT, YouTube, display, video, and others.

Sensor Tower Solutions



Sensor Tower **Gaming Insights**

For those who need the deepest look into the mobile gaming ecosystem.

Enjoy insight into: downloads, revenue, RPD, and ARPDAU beyond the top-level category (Lifestyle & Puzzle) and can drill deeper into genres (Puzzle, Arcade, etc.) and sub-genres (Swap, Word, etc.).



Sensor Tower **Advanced Usage Insights**

For those who need the deepest look into app user engagement.

Enjoy insight into: sessions per user; time spent; time of day; days used per time period; new, retained, resurrected, and churned user trends; and cohort usage overlap.



Sensor Tower **Pathmatics Retail Media Insights**

For those who need industry-first insight into on- and off-site retail media network investments

Enjoy insight into: ad spend, media mix, share of wallet, impressions, and SOV for brands and products across retailers – gaining a coveted view into the co-branded digital ad ecosystem and retail media networks.

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Executive Summary

The report provides an in-depth analysis of global food & dining apps and brands in 2025. This includes trends in global food & dining app downloads in recent years, changes in food & dining app downloads across iOS and Google Play and the performance of leading food & dining apps in key Asian-Pacific markets such as China, Japan, South Korea, Southeast Asia, and India. The report also leverages Sensor Tower's Advertising Insights to explore trends in digital advertising by top food & dining brands across different markets, as well as major advertising channels and popular ad creatives.

Notes on Download Estimates

Sensor Tower's download data are based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is unavailable in Mainland China.



Sensor Tower

Data & Methodology

Sensor Tower’s **Pathmatics** empowers you to uncover insights into the digital advertising ecosystem, minimize ineffective ad spend, and enhance the precision of your advertising campaigns. With Pathmatics, you gain visibility into the digital advertising landscapes across markets including the United States, Australia, Brazil, Canada, France, Germany, Italy, Japan, Mexico, New Zealand, Spain, and the United Kingdom. Pathmatics provides comprehensive estimates on ad placements, spending, impressions, and share of voice (SOV), as well as in-depth analysis of brands' advertising strategies on platforms like Facebook, Instagram, X (formerly Twitter), YouTube, and TikTok, across formats such as display banners, videos, mobile, and OTT.

Pathmatics collects digital ad samples from the web and utilizes statistical sampling methods to estimate the impressions, cost-per-thousand impressions (CPM), and expenditure associated with each creative.

Digital Advertising Channels Supported by Pathmatics Across Markets													
	United States	United Kingdom	Canada	Australia	New Zealand	Germany	Spain	Italy	France	Brazil	Mexico	Japan	South Korea
Facebook	•	•	•	•	•	•	•	•	•	•	•	•	•
Instagram	•	•	•	•	•	•	•	•	•	•	•	•	•
YouTube	•	•	•	•	•	•		•	•		•	•	
TikTok	•	•	•	•		•	•	•	•	•	•	•	
Snapchat	•	•	•	•		•	•	•	•				
X	•	•										•	
Linkedin	•	•	•			•			•				
Pinterest	•	•	•			•		•	•				
Reddit	•	•	•	•		•		•	•				
OTT	•												
Desktop Video	•	•	•	•	•	•							
Desktop Display	•	•	•	•	•	•							
Mobile Video	•	•	•	•	•	•							
Mobile Display	•	•	•	•	•	•							

Agenda

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Global Food & Dining Market Overview

Food & Drinks App Downloads Near 2 Billion in 2024, Growing 11% YoY

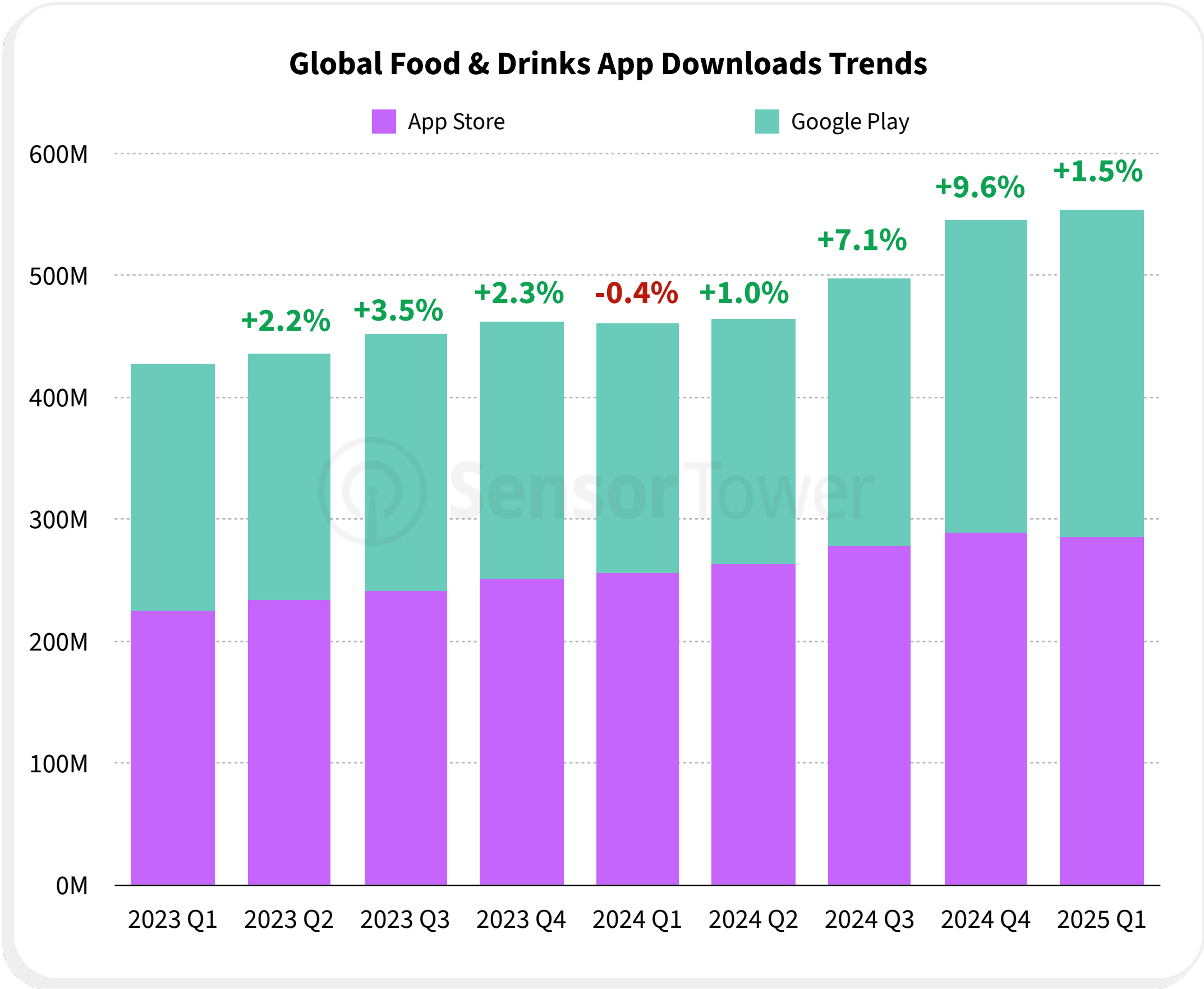
Global Food & Drinks app downloads nearly reached 2 billion in 2024, marking an 11% year-over-year increase from 1.78 billion in 2023. Growth accelerated in the second half of 2024, driven by strong performances in Q3 (+7.1%) and Q4 (+9.6%). This upward momentum continued into Q1 2025 (+1.5%), indicating sustained consumer interest.

The consistent growth across App Store and Google Play highlights strong demand for Food & Dining apps as mobile-first services gain traction. This trend offers opportunities for brands to enhance user engagement through innovation and personalized mobile experiences.

Notes on Download Statistics

Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is unavailable in Mainland China.

Note: Data as of March 2025
Data Source: Sensor Tower App Performance Insights



India Leads Food & Drink App Growth as Emerging Markets Surge

India saw explosive +143% YoY growth in Food & Drink app downloads, exceeding 113M by Q1 2025, driven by rapid digital adoption, smartphone penetration, and aggressive marketing by players like *Blinkit* and *Swiggy* through strategic campaigns and promotions. Southeast Asia also grew strongly at +18%, while South Korea rose by +4%.

China’s iOS Market saw a slight decline (-1.6%) due to market saturation from leaders like *Meituan* and *ele.me*, competition from apps like *Jingdong Daojia*, and *Douyin’s* expansion into food services. *Regulatory* challenges and shifting consumer preferences further contribute to the slowdown. Meanwhile, the U.S. and Japan maintained steady growth around 3%, while emerging markets present strong opportunities for expansion.

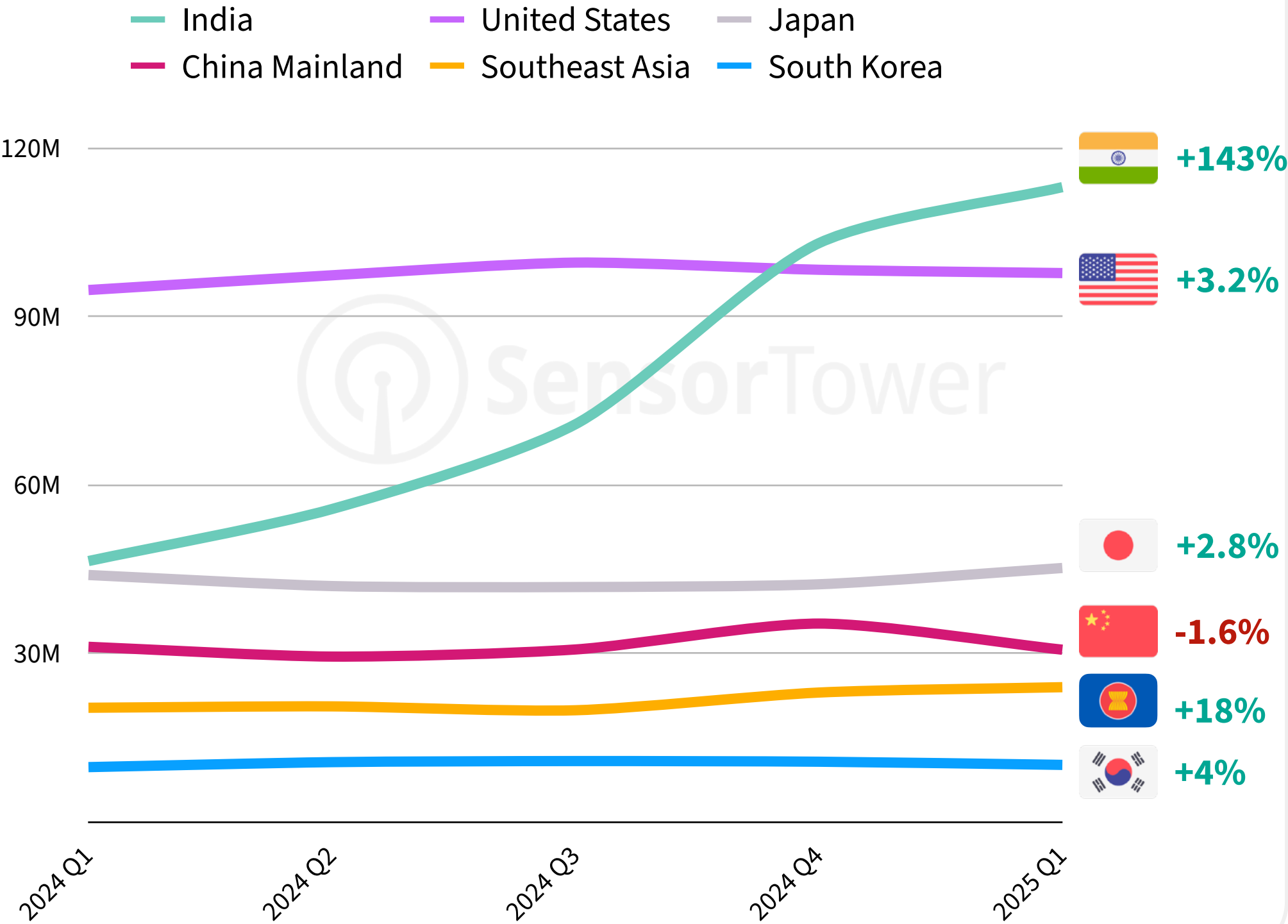
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Note: Data as of March 2025

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Downloads of Food & Drink apps in key regions



Grocery Delivery Drives Growth Among Food & Dining App Subgenres

Grocery delivery apps led growth in 2024, surging 36%, driven by increasing consumer demand for convenience. Dining & Restaurants grew strongly at 29%, alongside notable gains in Dine-In Restaurants at 16%, reflecting heightened spending on dining experiences.

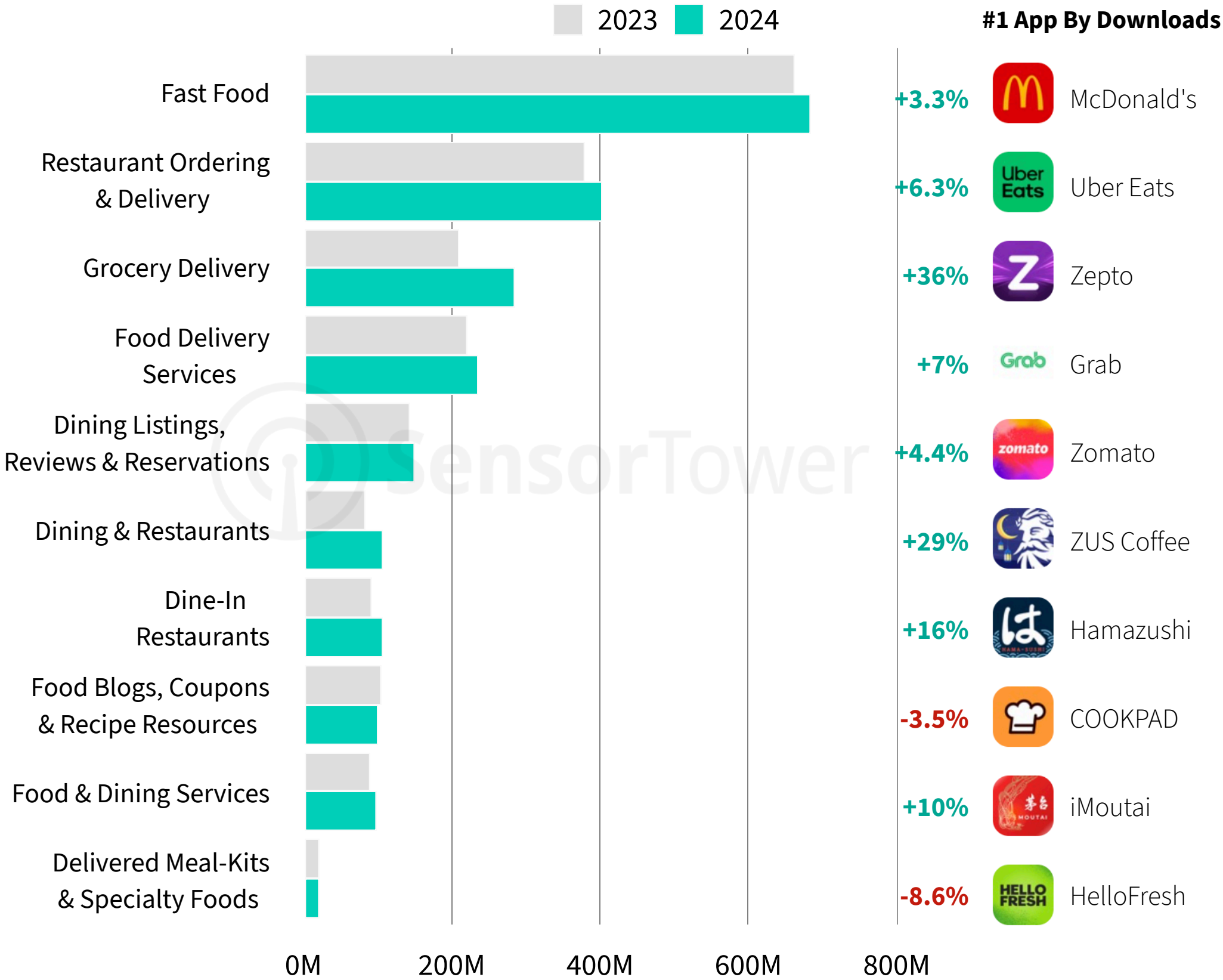
Fast Food grew by 3.3% and Restaurant Ordering & Delivery by 7%, driven by improved mobile apps and personalized promotions catering to convenience-focused consumers.

Meanwhile, Food Blogs & Recipe Resources fell 3.5%, and Delivered Meal-Kits dropped 8.6%, reflecting a broader shift as post-pandemic dining out and takeout rebounded. Apps like *Zepto*, *ZUS Coffee*, and *Uber Eats* capitalized on these trends, while the Delivered Meal-Kit category faced challenges adapting to the changing demand landscape.

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Note: Data as of March 2025
Data Source: Sensor Tower App Performance Insights

Subgenre of Food & Dining apps by Global Downloads

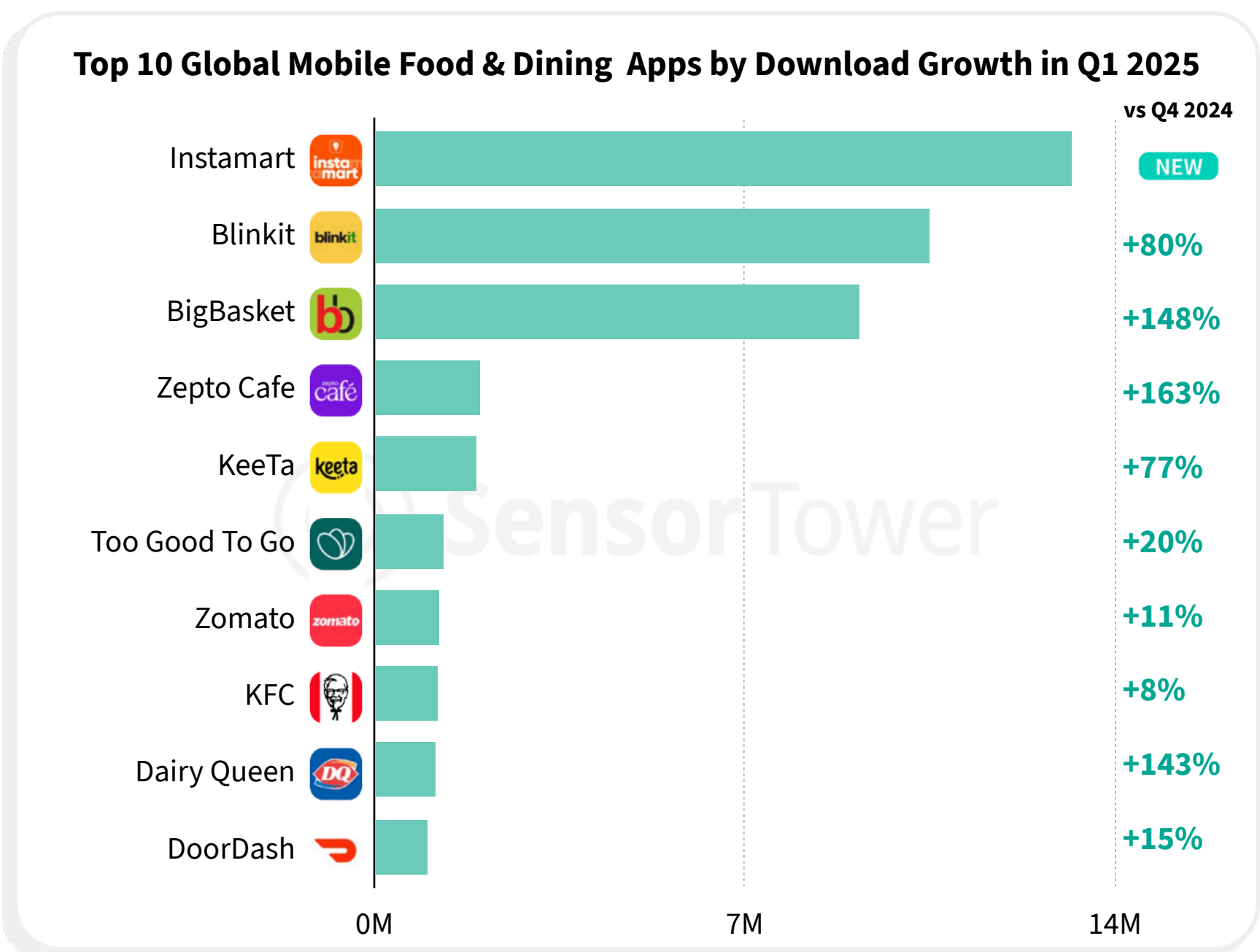
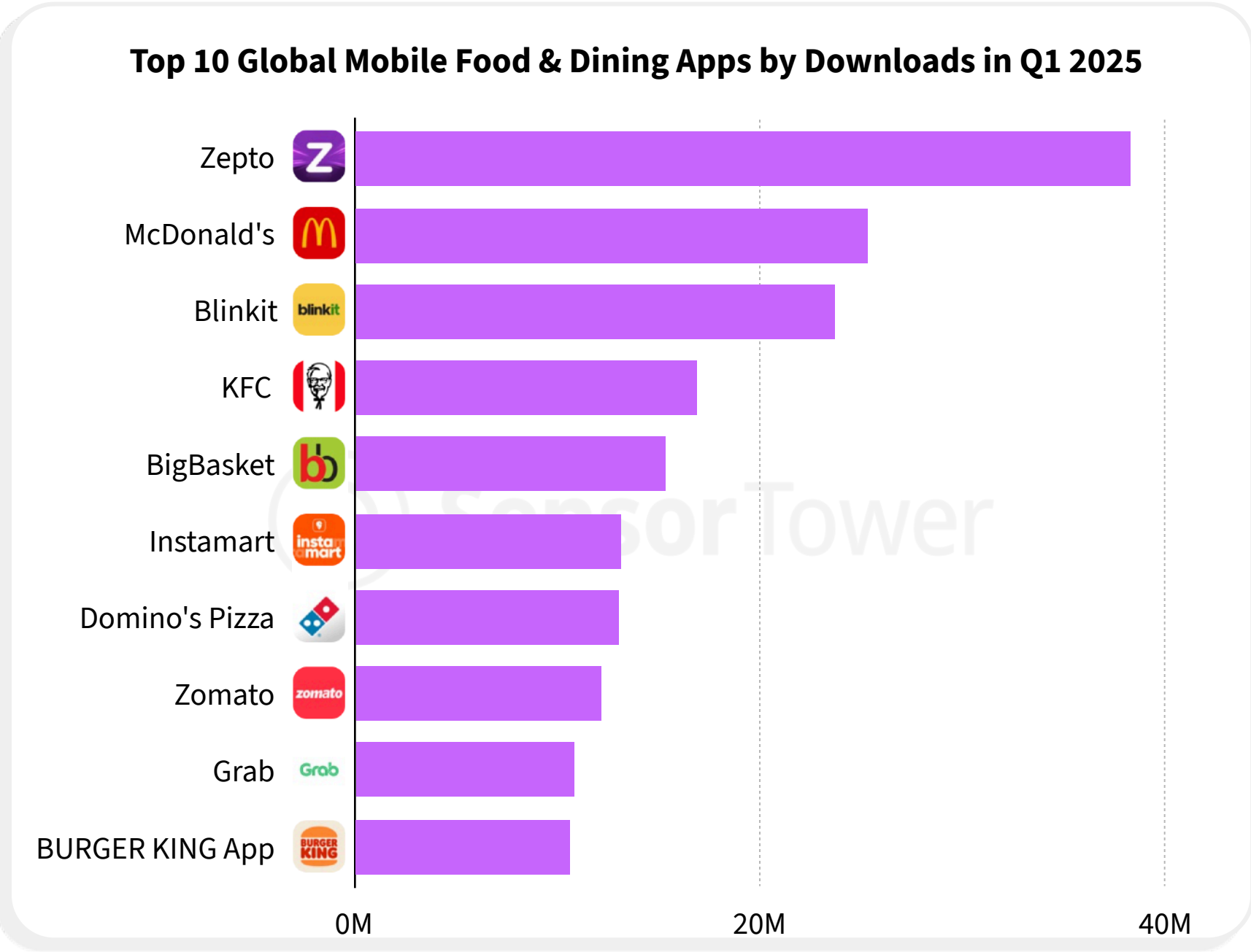


Zepto Tops Food & Dining App Downloads, While Instamart and Blinkit Accelerate Growth in Q1 2025

Data Source: Sensor Tower App Insights.
Notes on Download Statistics: Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is unavailable in Mainland China.

Grocery delivery app Zepto led global Food & Dining app downloads in Q1 2025, alongside major fast-food brands like McDonald's and KFC. Grocery and quick-commerce platforms such as Instamart and BigBasket also ranked highly, reflecting strong consumer demand for convenience and rapid delivery services.

Robust growth rates underscore the market's sustained momentum, led by significant surges from Instamart, Blinkit (80%) and BigBasket (148%), highlighting intense competition in grocery delivery. Additionally, Zepto Café stood out with exceptional 163% growth, emphasizing rising consumer interest in quick-service café experiences.








Regional Leaders in Food & Dining Apps Highlight Localized Consumer Preferences

Data Source: Sensor Tower App Insights.






Notes on Download Statistics: Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores. Google Play is unavailable in China’s mainland.

Regional Top 10 Mobile Food & Dining by Downloads in Q1 2025






United States

- 1  DoorDash
Restaurant Ordering & Delivery
- 2  McDonald's
Fast Food Burgers & Fries
- 3  DoorDash Driver
Restaurant Ordering & Delivery
- 4  Uber Eats
Restaurant Ordering & Delivery
- 5  Taco Bell
Fast Food Mexican & Taco






Europe

- 1  McDonald's
Fast Food Burgers & Fries
- 2  Too Good To Go
Restaurant Ordering & Delivery
- 3  BURGER KING App
Fast Food Burgers & Fries
- 4  KFC
Fast Food Chicken Shops
- 5  Uber Eats
Restaurant Ordering & Delivery






Latin America

- 1  iFood
Restaurant Ordering & Delivery
- 2  McDonald's
Fast Food Burgers & Fries
- 3  PedidosYa
Restaurant Ordering & Delivery
- 4  Rappi
Food Delivery Services
- 5  BURGER KING App
Fast Food Burgers & Fries






Japan

- 1  McDonald's
Fast Food Burgers & Fries
- 2  BURGER KING App
Fast Food Burgers & Fries
- 3  Yakiniku King official app
Dine-In Restaurants
- 4  Starbucks
Fast Food Cafes & Coffee Shops
- 5  Coke ON
Food & Dining Services

South Korea

- 1  Coupang Eats
Restaurant Ordering & Delivery
- 2  catch table
Dining Listings, Reviews & Reservations
- 3  BBQ Chik
Fast Food & Fast Casual Restaurants
- 4  bhc
Dining & Restaurants
- 5  I want it
Restaurant Ordering & Delivery

Middle East

- 1  KeeTa
Restaurant Ordering & Delivery
- 2  Ninja
Grocery Delivery
- 3  HungerStation
Food Delivery Services
- 4  Talabat
Restaurant Ordering & Delivery
- 5  McDonald's
Fast Food Burgers & Fries

Food & Dining app rankings in Q1 2025 reveal distinct regional preferences. Global brand *McDonald's* maintains dominance, securing the top position in Europe and Japan, while *DoorDash* leads the U.S. and iFood is the preferred choice in Latin America. Restaurant ordering & delivery apps like *Uber Eats*, *PedidosYa*, and *Rappi* also hold prominent spots across several markets.

In Asia, locally-focused platforms shine: South Korea favors *Coupang Eats*, while Japan sees notable demand for *Yakiniku King* and *Starbucks*. The Middle East market stands out for rapid growth in grocery and food delivery, with *KeeTa* and *Ninja* topping rankings. These diverse regional trends underline the importance of targeted strategies to effectively engage local consumers.

Top Food & Dining App Performance in Key APAC Markets



Grocery and Fast Food Apps Propel China’s iOS Food & Dining Market in Q1 2025

In Q1 2025, China's iOS Food & Dining market saw significant momentum driven by grocery delivery apps, especially *Jingdong Daojia*, which climbed sharply by 40 ranks. Fast food apps also strengthened their positions, with KFC moving up two spots to lead in downloads, and Pizza Hut rising five ranks. McDonald's also improved its position by one rank.




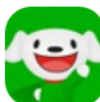












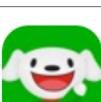

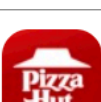

The rise of innovative newcomers like *AI Recipe Guru* reflects increasing consumer interest in personalized experiences and technological advancements, highlighting ongoing innovation in China’s food app ecosystem.

Notes on Download Statistics

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Note: Data as of March 2025
Data Source: Sensor Tower App Performance Insights

Top 10 Food & Dining Apps by Downloads and Downloads Growth in China’s iOS Market
Q1 2025

Downloads				Downloads Growth			
			vs Q4 2024				vs Q4 2024
1		Meituan	=	1		KFC	▲ 2
Food Delivery Services				Fast Food Chicken Shops			
2		KFC	▲ 2	2		Jingdong Daojia	▲ 40
Fast Food Chicken Shops				Grocery Delivery			
3		ele.me	=	3		McDonald's	▲ 1
Food Delivery Services				Fast Food Burgers & Fries			
4		Dianping	▼ 2	4		Xishi Magic Bag	▲ 30
Dining Listings, Reviews & Reservations				Food & Dining Services			
5		McDonald's	▲ 1	5		iMoutai	▲ 2
Fast Food Burgers & Fries				Food & Dining Services			
6		Meituan Waimai	▼ 1	6		Pizza Hut	▲ 5
Restaurant Ordering & Delivery				Fast Food Pizza			
7		Meituan	=	7		East Buy Holding Ltd	▲ 14
Restaurant Ordering & Delivery				Grocery Delivery			
8		iMoutai	▲ 2	8		Shengtuan Shenghuo	▲ 46
Food & Dining Services				Dining Listings, Reviews & Reservations			
9		Jingdong Daojia	▲ 40	9		Meituan Select	▲ 18
Grocery Delivery				Grocery Delivery			
10		Pizza Hut	▲ 5	10		AI Recipe Guru	NEW
Fast Food Pizza				Fast Food Sandwich Shops & Deli Stores			

Burger King, menu, and Dine-In Apps Lead Japan’s Food & Dining Market Growth in Q1 2025





















Japan’s Food & Dining app market in Q1 2025 saw fast food and restaurant apps making significant gains. *Burger King* surged 11 spots to second place, while *menu* climbed six ranks. *Denny’s* and *IeKei Ramen* also rose 21 and 28 positions, respectively, while *Kagonoya Official App* soared 215 spots, highlighting the rapid adoption of mobile platforms by restaurants.

Burger King App’s growth was driven by innovative app features like a tiered membership program, improved coupon system, streamlined mobile ordering, and personalized menu options. Enhanced convenience and loyalty-building efforts helped boost its popularity in Japan’s fast-food market.

Notes on Download Statistics
Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.

Note: Data as of March 2025
Data Source: Sensor Tower App Performance Insights

Top 10 Food & Dining Apps by Downloads and Downloads Growth in Japan
Q1 2025

Downloads				Downloads Growth			
vs Q4 2024				vs Q4 2024			
1		McDonald's	=	1		BURGER KING App	▲ 11
		Fast Food Burgers & Fries				Fast Food Burgers & Fries	
2		BURGER KING App	▲ 11	2		menu	▲ 6
		Fast Food Burgers & Fries				Food Delivery Services	
3		Yakiniku King official app	▼ 1	3		Cafe Veloce	NEW
		Dine-In Restaurants				Dining & Restaurants	
4		Starbucks	▲ 4	4		Kagonoya Official App	▲ 215
		Fast Food Cafes & Coffee Shops				Dine-In Restaurants	
5		Coke ON	▼ 2	5		Denny's	▲ 21
		Food & Dining Services				Fast Food & Fast Casual Restaurants	
6		Hamazushi	▼ 1	6		Komeda Coffee Shop	▲ 4
		Dine-In Restaurants				Fast Food & Fast Casual Restaurants	
7		Komeda Coffee Shop	▲ 4	7		Rocket Now	NEW
		Fast Food & Fast Casual Restaurants				Restaurant Ordering & Delivery	
8		Tabelog	▼ 4	8		My Lindt Club	▲ 4
		Dining Listings, Reviews & Reservations				Food & Dining Services	
9		menu	▲ 6	9		Delish Kitchen	▲ 5
		Food Delivery Services				Food Blogs, Coupons & Recipe Resources	
10		Mister Donuts	▼ 4	10		IeKei Ramen	▲ 28
		Fast Food & Fast Casual Restaurants				Fast Food & Fast Casual Restaurants	

South Korea's Food & Dining App Market Thrives as Fast Food and Local Brands Surge in Q1 2025

South Korea's Food & Dining app market in Q1 2025 saw strong growth driven by fast food and delivery apps. *BBQ Chik* jumped 10 spots to rank third in downloads, while *Coupang Eats* maintained its leadership. *CatchTable* retained the second spot in downloads, despite minor fluctuations, underscoring its strength in dining reservations.

New entrants like *Isaac Toast* and *Cheogajip* climbed 26 positions respectively, reflecting growing interest in localized dining options. The competitive landscape remains dynamic, with established brands and newcomers alike vying for market share.

Notes on Download Statistics











Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.











Note: Data as of March 2025

Data Source: Sensor Tower App Performance Insights

Top 10 Food & Dining Apps by Downloads and Downloads Growth in South Korea

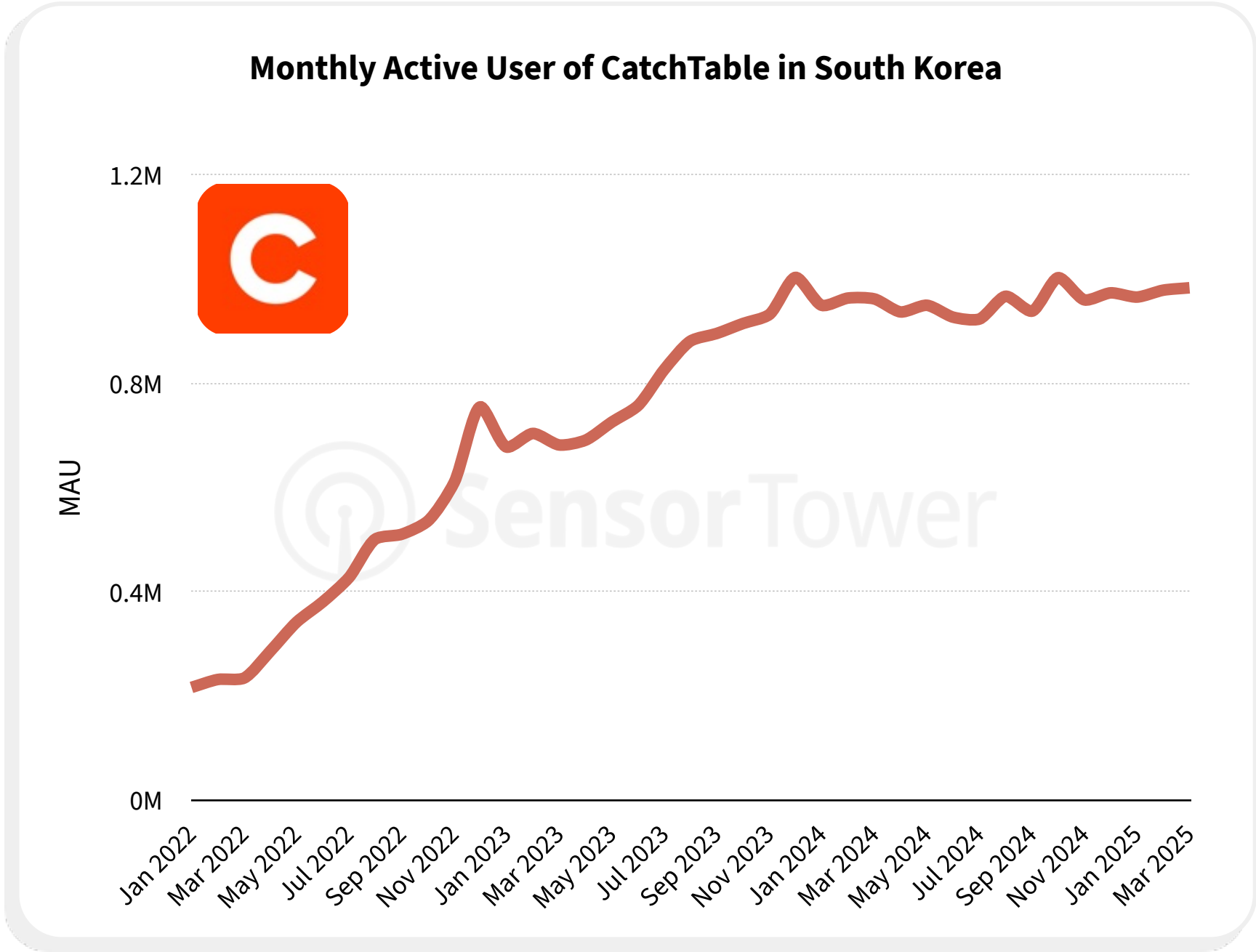
Q1 2025

Downloads			vs Q4 2024
1		Coupang Eats	=
Restaurant Ordering & Delivery			
2		catch table	=
Dining Listings, Reviews & Reservations			
3		BBQ Chik	▲ 10
Fast Food & Fast Casual Restaurants			
4		bhc	=
Dining & Restaurants			
5		I want it	▲ 3
Restaurant Ordering & Delivery			
6		Baedal Minjok	▼ 1
Restaurant Ordering & Delivery			
7		Starbucks	=
Fast Food Cafes & Coffee Shops			
8		Kyochon Chicken	▲ 2
Dining & Restaurants			
9		McDonald's	▲ 5
Fast Food Burgers & Fries			
10		Grab	▲ 2
Food Delivery Services			

Downloads Growth			vs Q4 2024
1		BBQ Chik	▲ 10
Fast Food & Fast Casual Restaurants			
2		Coupang Eats	=
Restaurant Ordering & Delivery			
3		Cheogajip Chicken	▲ 26
Fast Food & Fast Casual Restaurants			
4		Isaac Toast	NEW
Fast Food & Fast Casual Restaurants			
5		KFC	▲ 7
Fast Food Chicken Shops			
6		Lucky Meal	▲ 187
Dine-In Restaurants			
7		Hansam Coffee	NEW
Dining & Restaurants			
8		Lotteeatz	▲ 5
Dining & Restaurants			
9		I want it	▲ 3
Restaurant Ordering & Delivery			
10		bhc	=
Dining & Restaurants			

Exclusive Partnerships, User Incentives, and Premium Dining Experiences Driving CatchTable User Growth

Data Source: Sensor Tower App Insights. **Notes on Download Statistics:** Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.



CatchTable has experienced consistent growth in monthly active users (MAUs) in South Korea since early 2022. The platform saw a sharp rise through 2023, surpassing 1 million MAUs in late 2023, and has maintained a steady user base into early 2025. CatchTable’s strategic marketing campaigns drive growth by leveraging premium partnerships, user incentives, and exclusive dining experiences.

Top Creatives of CatchTable

Book Now

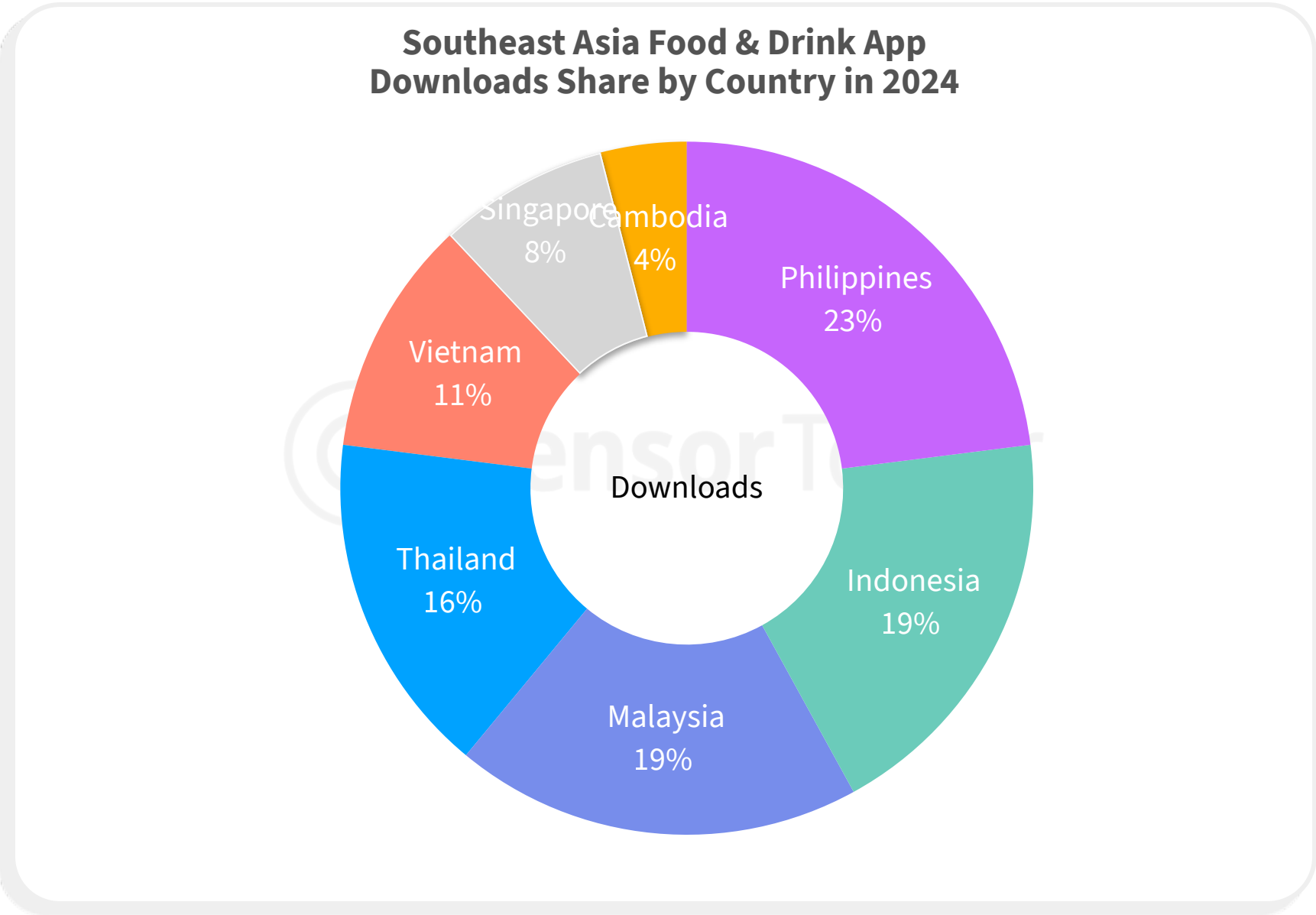
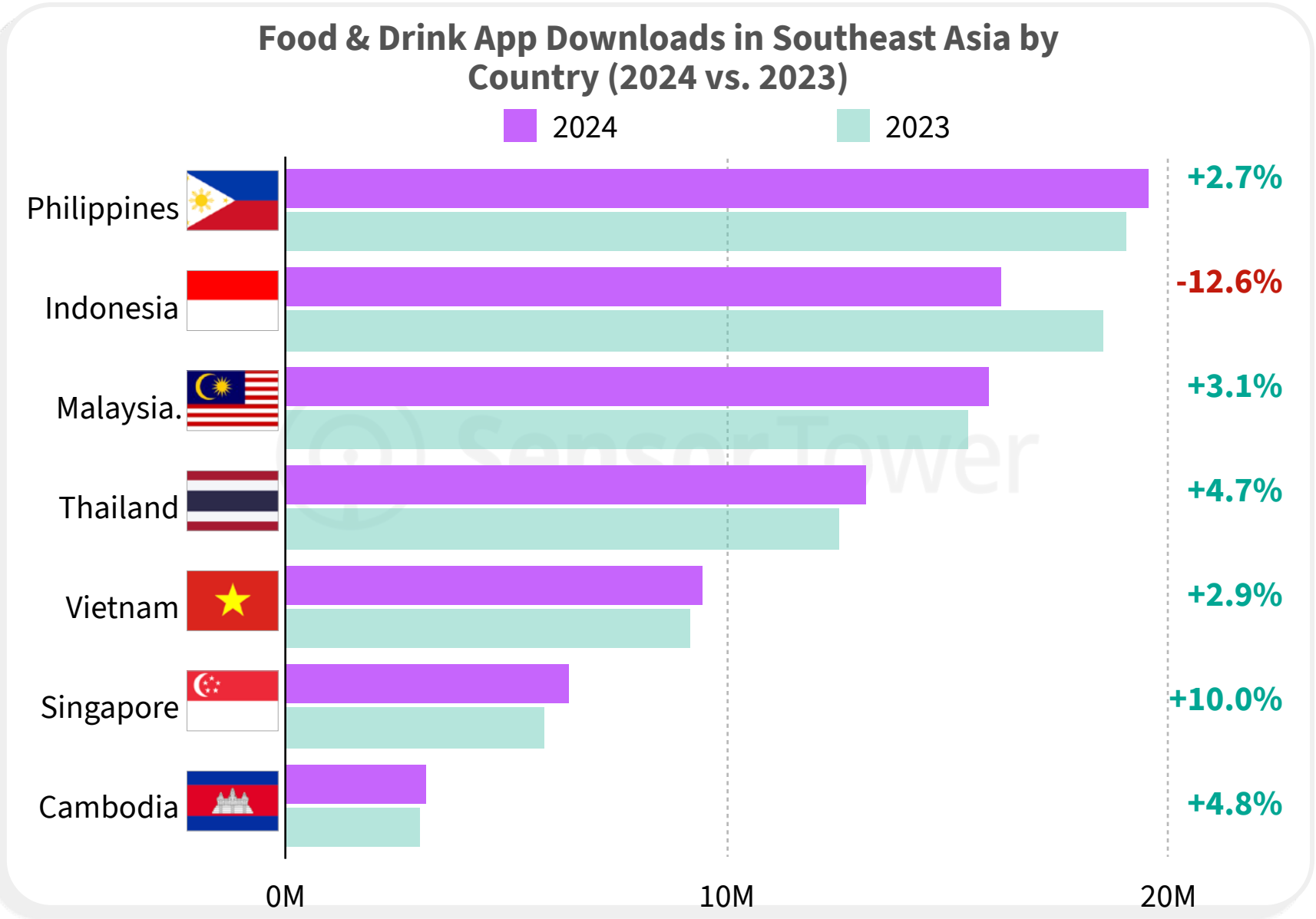
Learn More

Book now

Promotions like the Glenfiddich whisky pairing enhance brand positioning, while the 0-won reservation fee program lowers barriers for new users, increasing adoption. Additionally, limited-time bookings with celebrity chefs create urgency and attract food enthusiasts. These initiatives boost monthly active users (MAU), customer retention, and engagement, solidifying CatchTable’s presence as South Korea’s leading dining reservation platform.

Philippines Leads Southeast Asia in Food & Drink App Downloads, While Indonesia Sees a Modest Decline

Data Source: Sensor Tower App Insights. **Notes on Download Statistics:** Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.



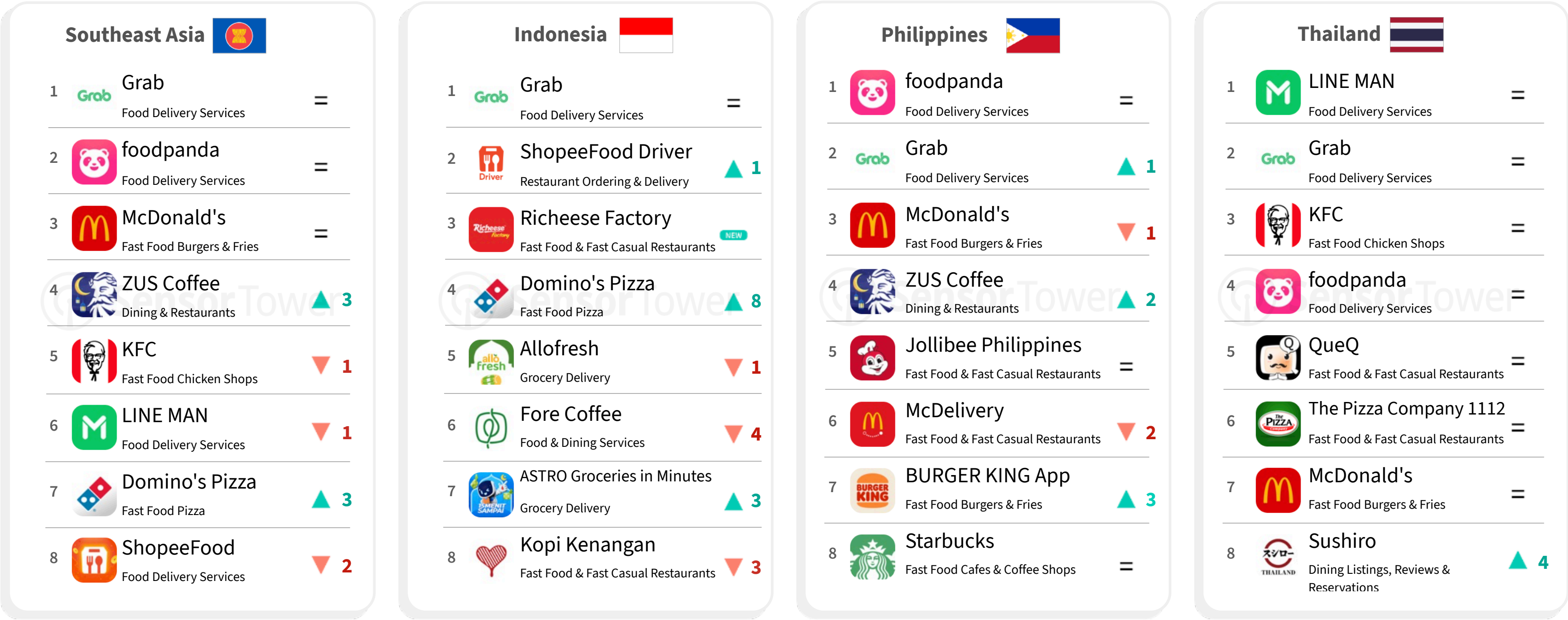
In 2024, the Philippines accounted for the largest share (23%) of Food & Drink app downloads in Southeast Asia, followed by Indonesia and Malaysia (both 19%). Despite this, Indonesia saw a -12.6% decline in downloads compared to 2023, likely due to a shift back to dining out post-pandemic, and economic concerns affecting discretionary spending. This suggests potential market saturation and a need for brands to better address evolving consumer demands.

Conversely, Singapore (+10.0%) and Malaysia (+3.1%) experienced strong growth, indicating rising demand for food delivery and dining services. While Thailand (+4.7%), Vietnam (+2.9%), and Cambodia (+4.8%) showed moderate increases, the overall market remains dynamic, with regional shifts shaping opportunities for app developers and service providers.

Southeast Asia’s Food & Dining Apps See Strong Growth in Specialty Coffee and Fast Food Delivery

Southeast Asia’s Food & Dining app market in Q1 2025 saw strong gains from *ZUS Coffee* in the Philippines, climbing two spots, and *Domino’s Pizza* in Indonesia, which jumped eight ranks, driven by demand for specialty coffee and fast food delivery. Grocery delivery also grew, with *ASTRO* in Indonesia rising three positions. McDonald’s experienced slight declines across the Philippines, Thailand, and Southeast Asia, while Sushiro’s four-rank rise in Thailand highlights growing interest in dining reservation apps. The region continues to see varied growth across delivery and dine-in services.

SEA Top 10 Mobile Food & Dining by Downloads in Q1 2025

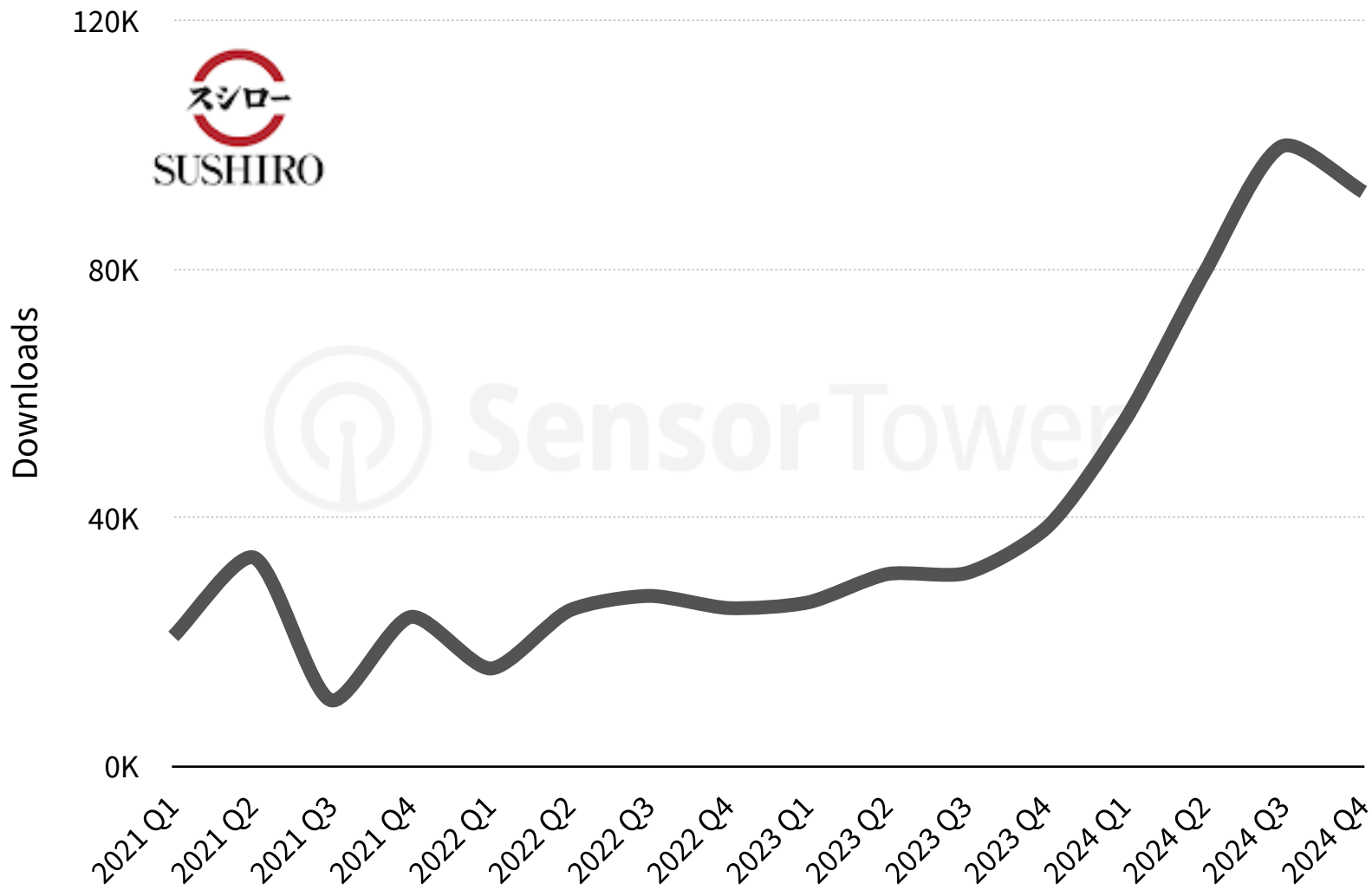


Data Source: Sensor Tower App Insights. Notes on Download Statistics: Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.

Sushiro's Growth in Southeast Asia: Consistent Digital Experience Fuels Expansion

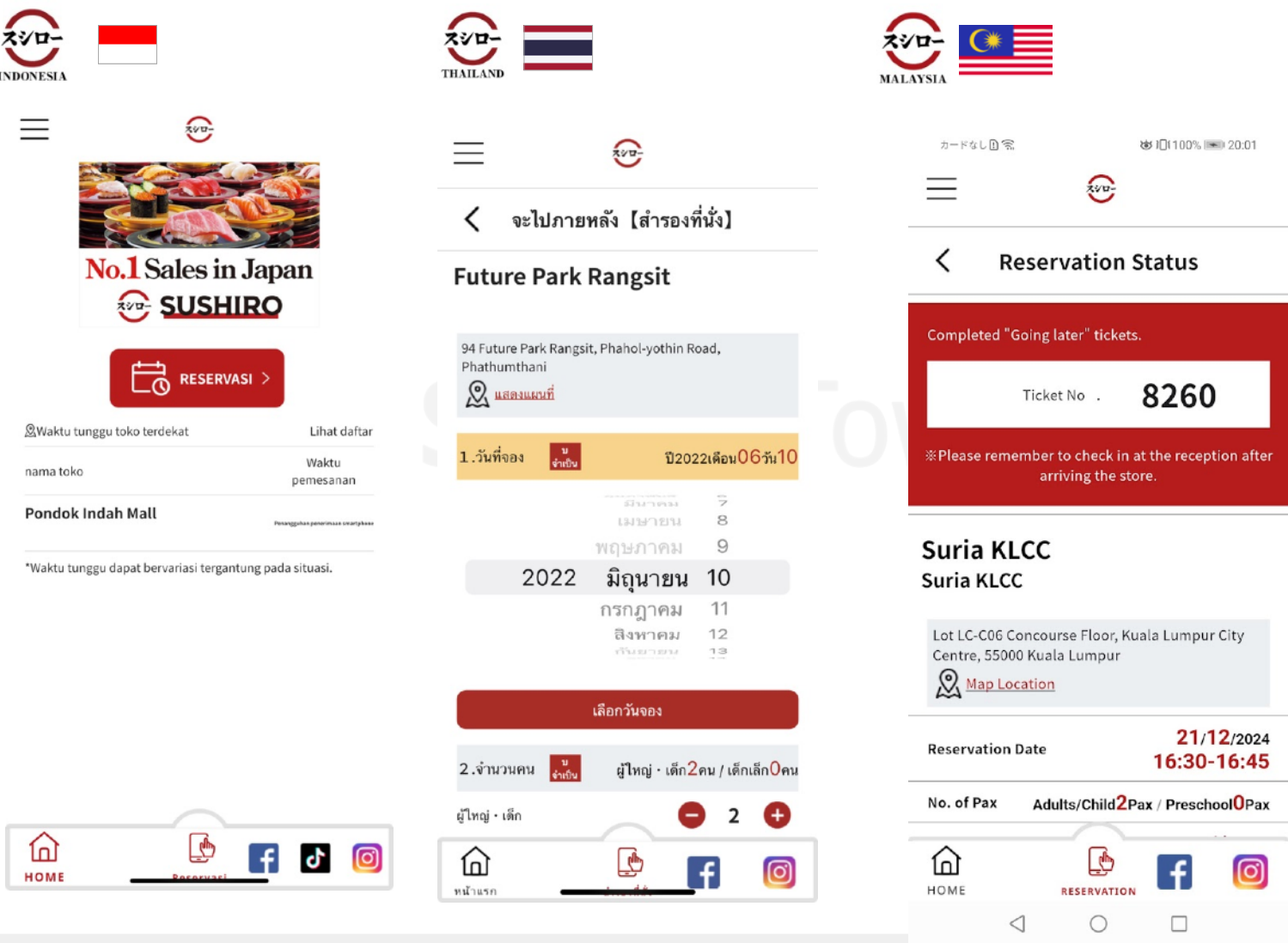
Data Source: Sensor Tower App Insights. **Notes on Download Statistics:** Sensor Tower's download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.

Downloads of Sushiro in Southeast Asia



Sushiro's sharp increase in app downloads across Southeast Asia reflects its successful digital strategy and regional expansion. A consistent app experience across Singapore, Indonesia, Thailand, and Malaysia has streamlined reservations and queue management, enhancing customer convenience.

Southeast Asia Versions of Sushiro



Sushiro delivers a consistent digital experience across markets while incorporating local languages and reservation preferences. This balanced approach ensures users can check wait times, book tables, and manage their dining experience seamlessly. By prioritizing ease of use and efficiency, Sushiro has reinforced its market presence and set a standard for restaurant brands embracing digital transformation.

Grocery Delivery Apps Dominate India's Food & Dining Market in Q1 2025

India’s Food & Dining app market in Q1 2025 was fueled by aggressive marketing and rapid growth in grocery delivery services. *BigBasket* rose three positions, while *Blinkit*, backed by heavy promotional efforts, maintained its rank with strong performance. Newcomer *Instamart: 10 Mins Grocery* made a significant debut, highlighting high demand for fast, convenient grocery solutions. *Zepto* retained the top spot, while *Zepto Cafe* climbed four ranks, gaining traction in restaurant ordering.

In contrast, traditional food delivery apps like *Swiggy* and *Domino’s Pizza* saw slight declines, as consumers increasingly favored ultra-fast delivery options promoted by aggressive campaigns. Meanwhile, *Bistro: Food in Minutes*, which jumped 36 positions, exemplifies the growing competition in India’s quick commerce and food delivery space





















Notes on Download Statistics

Sensor Tower’s download data is based on estimates from App Store and Google Play, excluding pre-installs, re-downloads, and downloads from third-party Android stores.

Note: Data as of March 2025

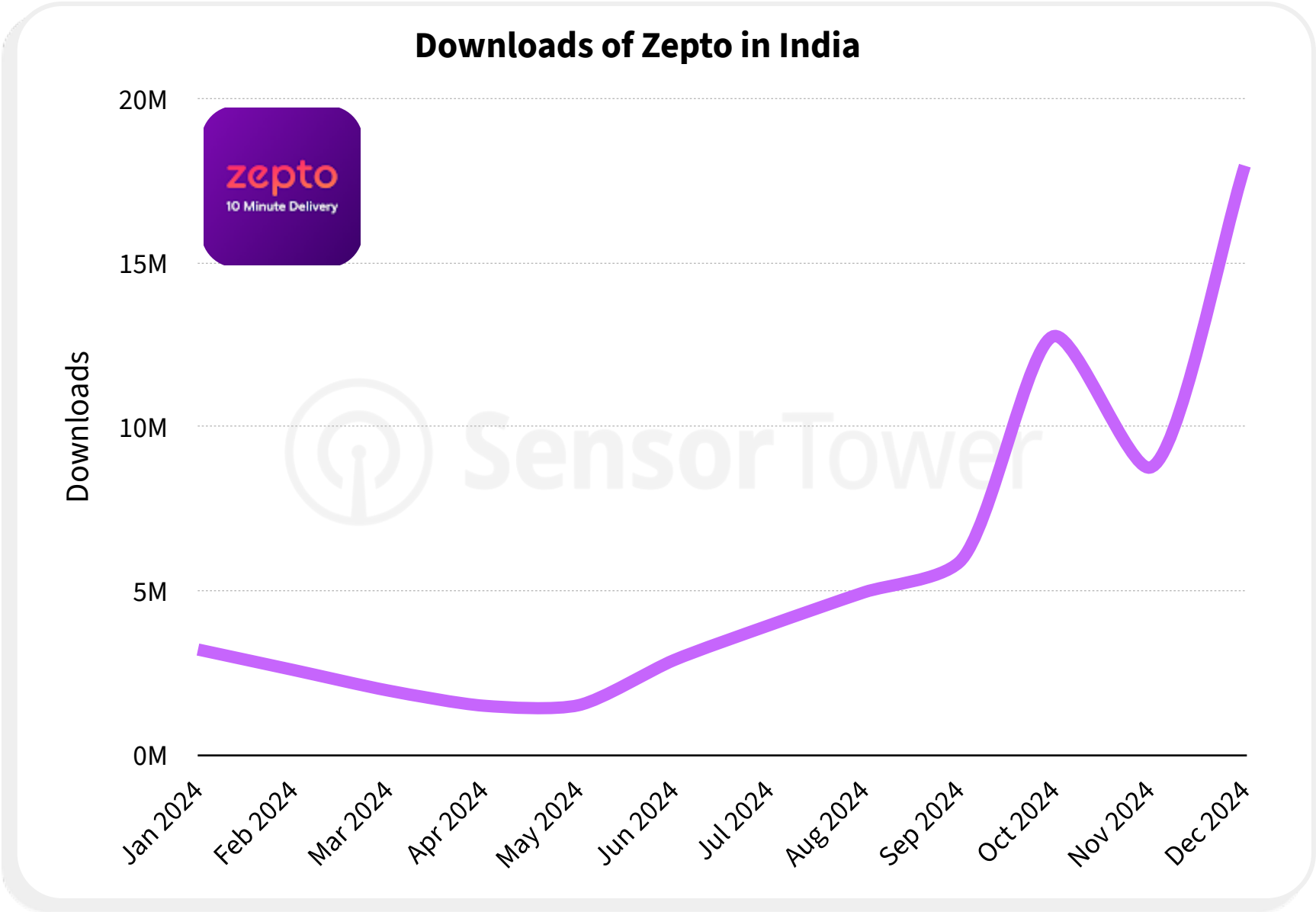
Data Source: Sensor Tower App Performance Insights

Top 10 Food & Dining Apps by Downloads and Downloads Growth in India Q1 2025

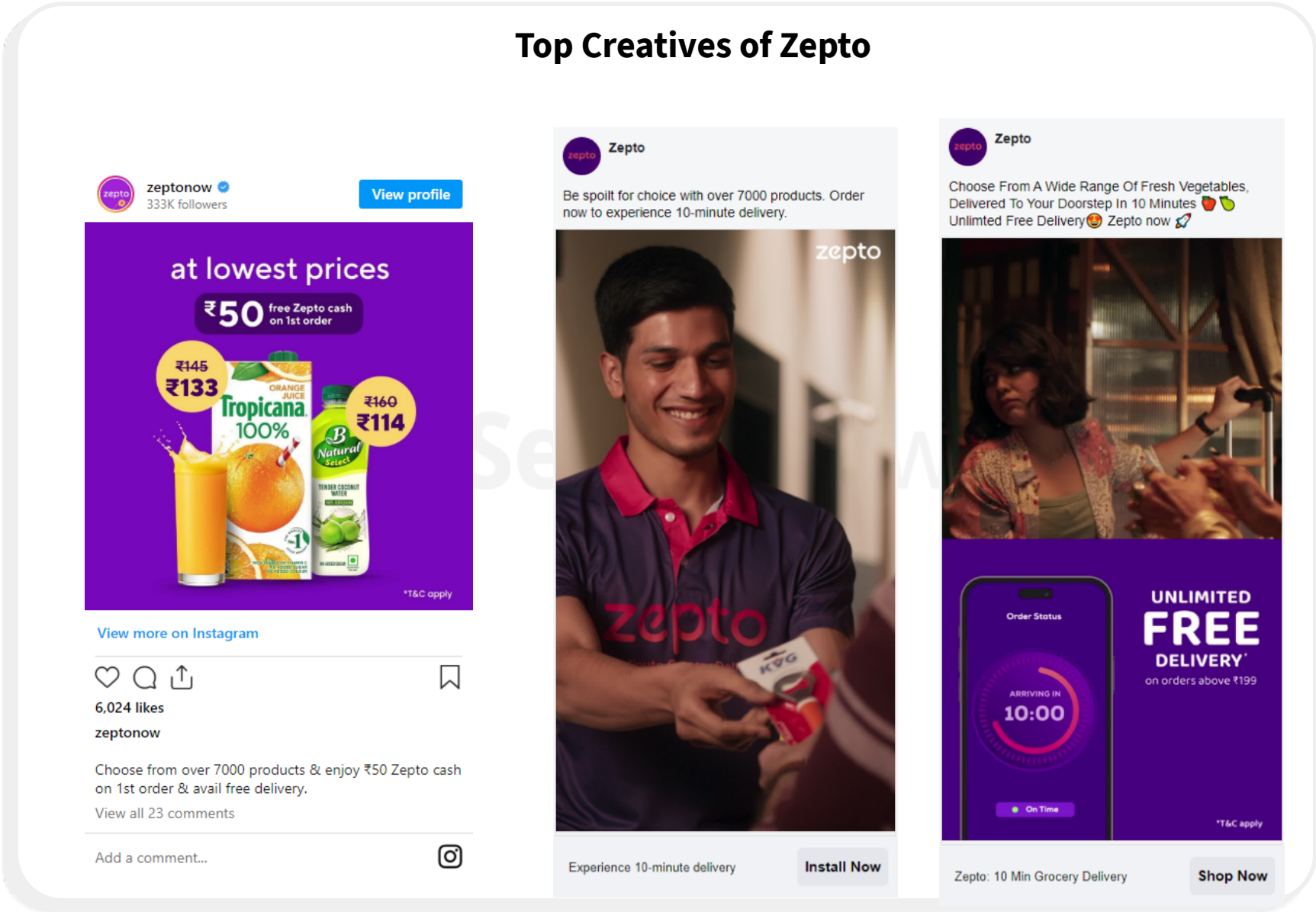
Downloads				Downloads Growth			
vs Q4 2024				vs Q4 2024			
1		Zepto	=	1		Instamart: 10 Mins Grocery	NEW
		Grocery Delivery				Grocery Delivery	
2		Blinkit	=	2		Blinkit	=
		Grocery Delivery				Grocery Delivery	
3		BigBasket	▲ 3	3		BigBasket	▲ 3
		Grocery Delivery				Grocery Delivery	
4		Instamart: 10 Mins Grocery	NEW	4		Zepto Cafe	▲ 4
		Grocery Delivery				Restaurant Ordering & Delivery	
5		Zomato	▼ 1	5		Zomato	▼ 1
		Dining Listings, Reviews & Reservations				Dining Listings, Reviews & Reservations	
6		Swiggy Food Delivery	▼ 3	6		SNACC: 10-Min Food	NEW
		Restaurant Ordering & Delivery				Restaurant Ordering & Delivery	
7		Domino's Pizza	▼ 2	7		EatClub: Food Delivery App	▲ 5
		Fast Food Pizza				Restaurant Ordering & Delivery	
8		Mera Ration 2.0	▼ 1	8		DealShare - Online Kirana	▲ 3
		Grocery Delivery				Grocery Delivery	
9		Zepto Cafe	▲ 4	9		Bistro: Food in minutes	▲ 36
		Restaurant Ordering & Delivery				Restaurant Ordering & Delivery	
10		Country Delight Milk &	▼ 2	10		Pizza Hut	▲ 1
		Grocery Delivery				Fast Food Pizza	

Zepto Sees Explosive Growth in India, Peaking in Late 2024

Data Source: Sensor Tower App Insights.



Zepto experienced a significant surge in downloads throughout 2024, with a sharp acceleration in the second half of the year. After a slow start, downloads picked up steadily from mid-year, surpassing 10 million in October and peaking near 20 million in December. Zepto’s top creatives emphasize affordability, speed, and convenience to attract and retain customers.



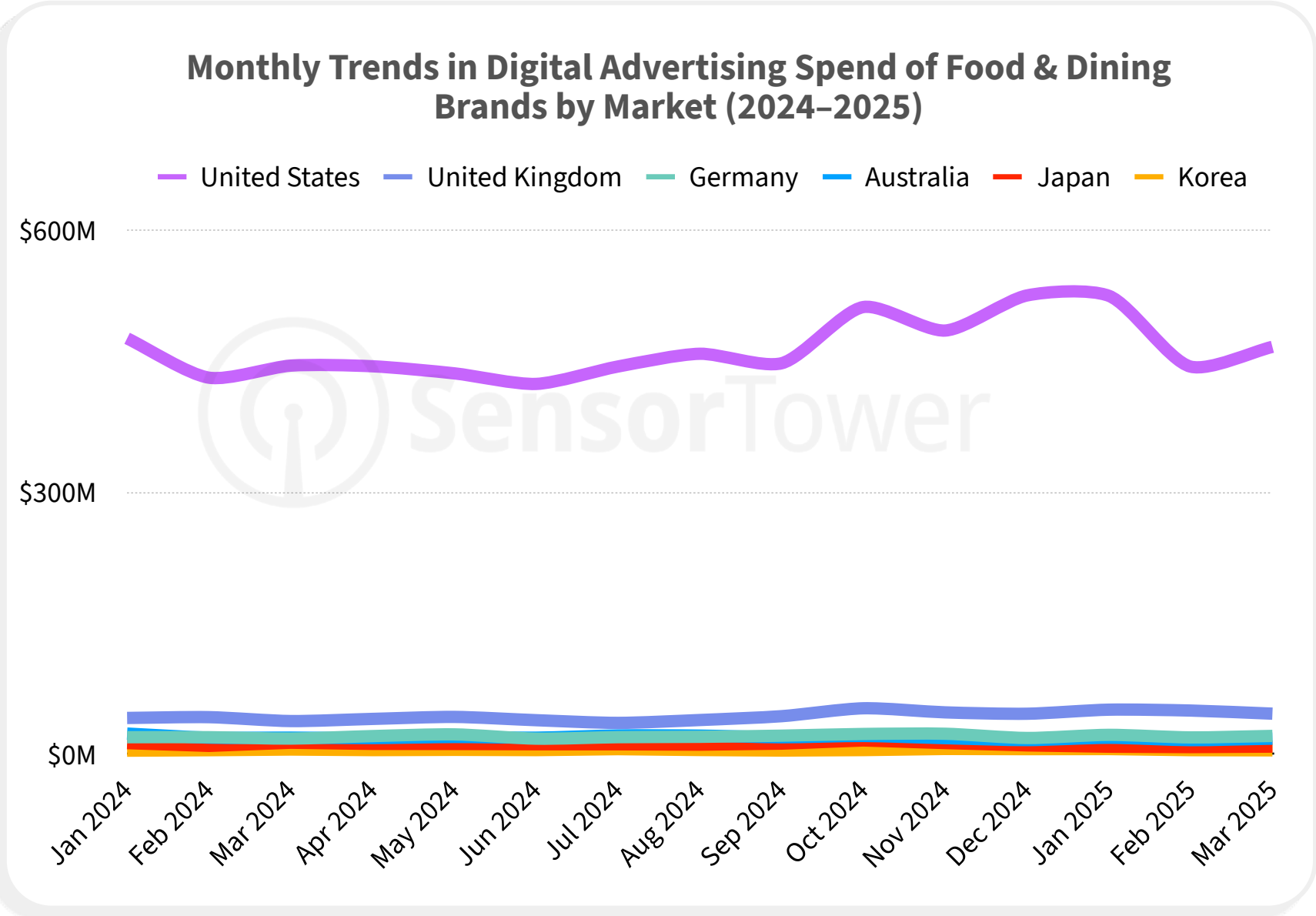
Promotional discounts and cashback offers highlight cost savings, appealing to price-conscious shoppers and encouraging first-time purchases. The brand’s 10-minute delivery promise is reinforced through relatable scenarios, showcasing reliability and efficiency. Additionally, free delivery incentives on larger orders encourage higher spending while reinforcing Zepto’s commitment to affordability and ease. Through these strategies, Zepto effectively positions itself as a fast, budget-friendly, and convenient grocery delivery service.

Digital Advertising Performance of Food & Dining Brands

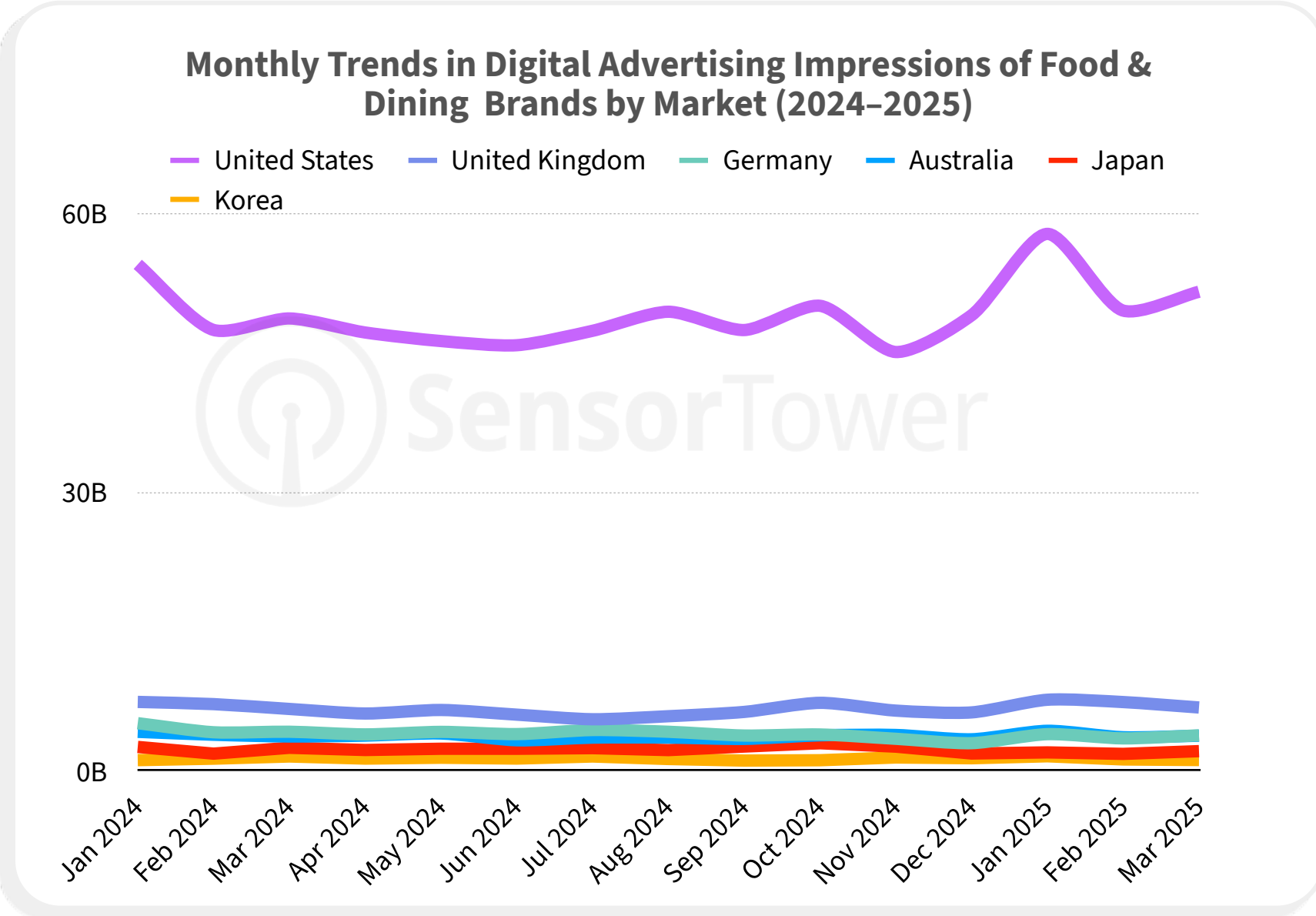


U.S. Leads Digital Advertising Spend and Impressions in Food & Dining Sector

Source: Sensor Tower Digital Advertising Insights by Pathmatics. Note: Includes a selection of advertising channels. Ad spend estimates as of March 2025. Available ad channels vary by market.
Period: Jan 1, 2024 – March 30, 2025



The U.S. dominated digital advertising spend for Food & Dining brands, with monthly expenditures surpassing \$600M by late 2024. Ad spend showed a steady upward trend throughout the period, with occasional seasonal peaks. Other markets, including the UK, Germany, Australia, Japan, and Korea, maintained significantly lower spending levels, reflecting a more concentrated digital ad push in the U.S.





















































Similarly, ad impressions followed a parallel trend, with the U.S. reaching over 60 billion impressions per month by early 2025. The sustained rise in both spend and impressions suggests brands are prioritizing digital channels for customer acquisition and engagement, particularly in the U.S., where competition in food delivery and dining services continues to intensify.

Leading Food & Dining Advertisers Vary by Region, With Global Brands Dominating

Source: Sensor Tower Digital Advertising Insights by Pathmatics. Note: Includes a selection of advertising channels. Ad spend estimates as of March 2025. Available ad channels vary by market.

Period: Jan 1, 2025 – March 30, 2025

2025 Q1 Top 10 Food & Dining Advertisers

Unites States			United Kingdom			Japan			South Korea			Australia		
Rank	Icon	Advertiser	Rank	Icon	Advertiser	Rank	Icon	Advertiser	Rank	Icon	Advertiser	Rank	Icon	Advertiser
1		Domino's Pizza	1		McDonald's	1		Uber Technologies, Inc.	1		Woowa Bros Co., Ltd.	1		Yum! Brands
2		Inspire Brands, Inc.	2		Uber Technologies, Inc.	2		Yum! Brands	2		McDonald's	2		McDonald's
3		Yum! Brands	3		Yum! Brands	3		McDonald's	3		Papa John's	3		DoorDash, Inc.
4		DoorDash, Inc.	4		Deliveroo (Roofoods Limited)	4		Nosh (Nash Co., Ltd.)	4		Restaurant Brands International Inc. (RBI)	4		Uber Technologies, Inc.
5		HelloFresh Group	5		Simmer Ltd.	5		Greenspoon Inc.	5		HOTSEASONER	5		HelloFresh Group
6		McDonald's	6		Domino's Pizza	6		Inspire Brands, Inc.	6		Yum! Brands	6		Hungry Jack's
7		Restaurant Brands International Inc. (RBI)	7		Just Eat Takeaway.com	7		Oisix ra daichi Inc.	7		Shuttle Co.	7		Youfoodz
8		Uber Technologies, Inc.	8		Papa John's	8		Skylark Group	8		디저트39 (SMC INTERNATIONAL CO., LTD.)	8		Subway
9		Instacart (Maplebear Inc.)	9		Gousto (SCA Investments)	9		menu, Inc.	9		Cookat Co	9		Guzman y Gomez Pty Ltd (GYG)
10		Chick-fil-A, Inc.	10		Oddbox Delivery	10		Marugame Udon UK	10		Domino's Pizza	10		Domino's Pizza

Global brands maintain influence through heavy digital ad investments. Yum! Brands leads in Australia and maintains presence across all markets, while McDonald’s ranks high in the UK, Australia, South Korea, and Japan. Uber Eats and Woowa Bros dominate in Japan and South Korea, highlighting strong food delivery services. Domino’s Pizza consistently ranks in the top ten, especially in the U.S. and UK. Despite strong regional players, multinational brands shape the market through strategic ad spend.

Food & Dining Brands Drive Engagement with Localized Campaigns, Discounts, and Collaborations

Source: Sensor Tower Digital Advertising Insights

Top creatives from major food and dining brands in APAC showcase how advertisers tailor campaigns using cultural relevance, pricing incentives, and strategic collaborations. KFC Japan partners with Genshin Impact to engage gaming audiences, while Wolt emphasizes limited-time discounts to drive food delivery adoption. In South Korea, Baedal Minjok promotes affordable meal deals for price-sensitive consumers, and Burger King leverages local nostalgia and humor to enhance brand recognition. These examples highlight the impact of localized campaigns in boosting consumer engagement and aligning with regional market dynamics.

**KFC**

原神とKFCのコラボパックが登場。パックA購入者はコラボ限定ビジュアルのチケットファイルがもらえる。数量限定のため今すぐネットオーダーで。

**原神**
Genshin

コラボ実施中!

**KFC**

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※2/10(月)~2/23(日)は総額最大¥5,600割引(¥800x7回)です。Wolt+メンバーは総額最大¥6,300割引(¥900x7回)です。詳しくはWoltアプリをダウンロードしてください。

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Food & Dining Brands Diversify Digital Ad Spend Across Platforms in Q1 2025

Food & Dining brands are tailoring their digital ad strategies to suit regional preferences and platform strengths. In the United States, Domino’s Pizza and Inspire Brands prioritize YouTube and OTT for broad visibility, allocating over half of their budgets to these channels, respectively, emphasizing high-reach, visually engaging content.

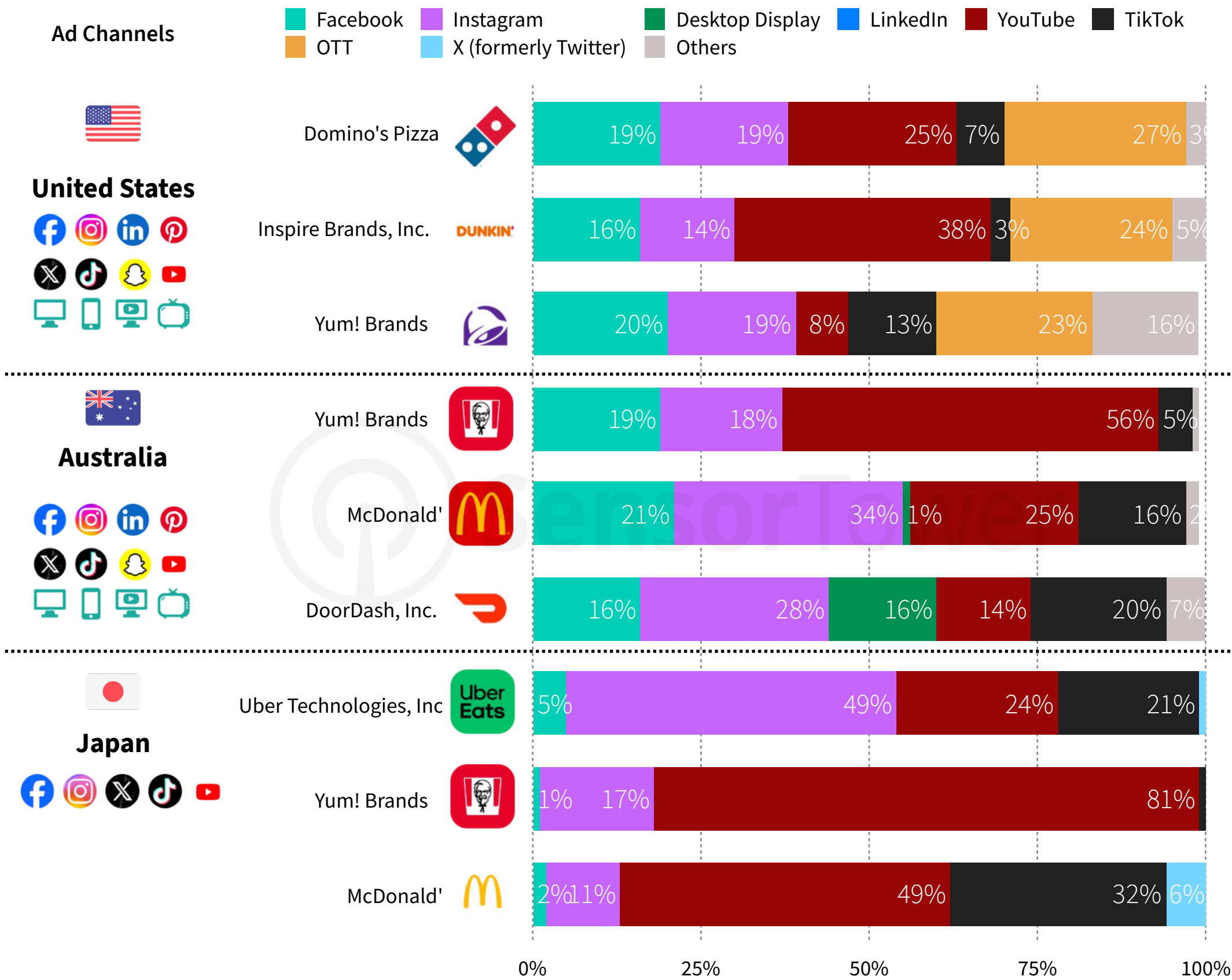
In Australia, YouTube remains a key channel for Yum! Brands (56%), while DoorDash employs a diversified strategy, targeting both mobile and digital audiences through Instagram (28%) and Desktop Display (16%).

In Japan, Uber Eats leans heavily on Instagram (49%) and TikTok (21%) to engage younger demographics, while Yum! Brands (81%) and McDonald’s (49%) focus on YouTube, leveraging long-form content similar to traditional advertising.

These variations highlight how mobile-first platforms prioritize dynamic social media engagement, while established brands maintain visibility through broader, multi-platform approaches.

Source: Sensor Tower Digital Advertising Insights by Pathmatics. Note: Includes a selection of advertising channels. Ad spend estimates as of March 2025. Available ad channels vary by market.
Period: Jan 1, 2025 – March 30, 2025

Distribution of digital advertising expenditure by leading Food & Dining services in Q1 2025 - by available channel



Conclusion



Rapid Growth in Food & Dining App Downloads Across Key Markets

The Food & Dining app sector saw strong global growth, with downloads nearing 2 billion in 2024, driven by demand for convenience and quick commerce. India led growth at +143%, fueled by grocery delivery and fast commerce expansion. Southeast Asia saw gains in specialty coffee and fast food delivery, while the U.S. and Japan maintained steady growth. These trends highlight ongoing opportunities for digital food services, especially in high-growth regions.



Regional Leaders and Competitive Shifts Shape the Market

Global brands like McDonald's, Domino's Pizza, and Uber Eats remain dominant, but emerging players are reshaping the landscape. BBQ Chik and Coupang Eats gained traction in South Korea, while BURGER KING App expanded in Japan. In China, Jingdong Daojia surged, reflecting shifting consumer preferences. As established brands invest in digital presence, localized and innovative services are capturing market share through convenience and tailored offerings.



Digital Advertising Surges, Led by U.S. and Global Fast Food Brands

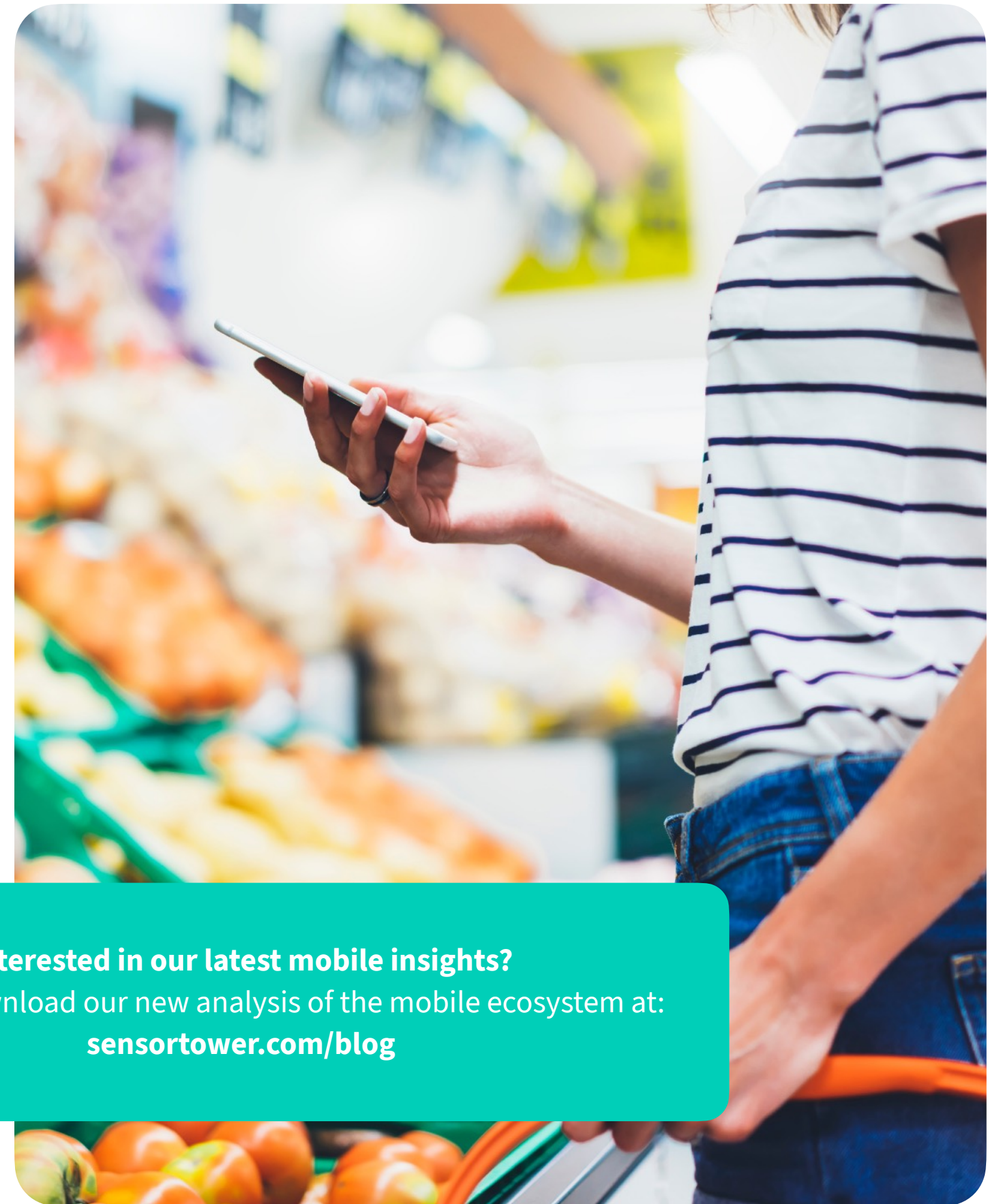
Digital ad spending in the Food & Dining industry peaked in the U.S., exceeding \$600M monthly by late 2024, with impressions over 60 billion. Yum! Brands, McDonald's, and DoorDash led advertising across regions, while Uber Technologies led in Japan. Brands diversified their ad spend across Facebook, Instagram, YouTube, and OTT platforms to boost reach, highlighting the importance of online engagement for customer acquisition.

Sensor Tower

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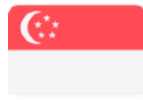
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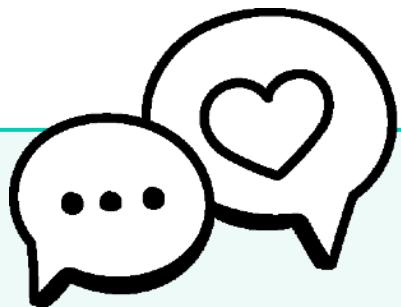


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