






Consumer Behaviour and the Future of the Food Industry Exploring Multi-Brand Cloud Kitchen

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Abstract. Advancements in digital technology have created a tremendous impact on the food business, making food ordering and delivery quick and easy for consumers, and causing a significant shift in consumer dining preferences. The food-delivery business is on a steady rise, especially in the post-pandemic era, this played a key component in the rise of the disruptive business model of cloud kitchens. This model of business is now diversifying with the concept of multi-brand cloud kitchens which operate several distinct culinary brands within a single kitchen facility, thereby reducing overhead costs, maximizing resource utilization, and addressing the growing consumer demand for diverse cuisines. This study conducts a comprehensive literature review to synthesize research on multi-brand cloud kitchens, critically examining how these models are reshaping food service operations, enhancing operational efficiency, and influencing consumer behaviour. Thematic analysis reveals four key dimensions: the role of advanced technologies such as artificial intelligence, augmented reality, and automation in streamlining food operations; strategic business models that leverage shared infrastructure and scalable branding; the shift in consumer behaviour favouring delivery, variety, and convenience; and the operational efficiencies gained through centralized kitchens and flexible menu offerings. The findings also highlight challenges related to branding confusion, regulatory gaps, and the need for targeted digital marketing. Implications are discussed for restaurateurs, policymakers, and researchers, emphasizing the need for data-driven strategies, updated food safety frameworks, and consumer-focused studies. While the cloud kitchen model presents significant opportunities for growth and innovation, further empirical research is recommended to address sustainability and consumer loyalty in a multi-brand ecosystem.

Keywords: Multi-brand Cloud Kitchens; Consumer Behaviour, Food Service Innovation.

1 Introduction

1.1 Background of the Food Industry's Transformation

The food industry is always transforming and changing to appeal to old, new and future consumers. Post-COVID-19 pandemic the food industry made advances in leaps and bounds in terms of digital transformation which was further enhanced with the food aggregator business. Online food ordering leapt forward in the post-pandemic era spurred by the induced demand in

the dearth of general facilities available at the time, resulting in an increase in sales and leading to a change in consumer buying behaviour [1]. This means of food order and delivery revolutionized the way consumers purchased food and accelerated the online food delivery business. This demand gave way to the rise of innovations in technology that promoted online food delivery with mobile applications and food aggregator business growth [1,2].

Charged with the ease of food order and delivery, results in a new market to address the need of the shift in consumer preferences from traditional dining-in to the convenience of online food delivery. The business model of cloud kitchens also referred to as ghost kitchens or virtual kitchens started operations wherein low costs were involved as the business functioned only with a fully operational kitchen and no physical restaurant. A cloud kitchen's main focus was on the preparation and delivery of food based on online orders, with a strong marketing team to promote the company. The cloud kitchen model has diversified into multi-brand cloud kitchens, where multiple virtual restaurant brands operate from a single kitchen facility, optimizing resources, cutting costs, and expanding menu diversity [3]. This has paved the path for the new disruptive business model that restaurants can explore and can even be considered as a tool for business expansion [3].

Hence this study is aimed at understanding the trend of cloud kitchens with an emphasis on growth and expansion of multi-brand cloud kitchens.

1.2 Research Questions

Cloud kitchens have witnessed tremendous growth over recent years, and research is progressing in this area, and to push the envelope further the business model of multi-brand cloud kitchens needs to be studied. The research questions that this paper investigates are on how the cloud kitchen business model is influencing consumer behaviour, and what its impact on the operations of cloud kitchens.

Hence this research paper delves into four main research questions, as listed below:

- How do technological advancements help in supporting multi-brand cloud kitchens?
- What are the driving factors of multi-brand cloud kitchen and what is its impact on addressing shifting consumer preferences?
- What are the research gaps, to determine the direction of future research?

1.3 Significance of the Study

The findings of this study will be valuable for restaurant owners, food aggregators, policymakers, and researchers interested in understanding how cloud kitchens are shaping the future of the food industry.

2 Literature Review

2.1 Concept of Cloud Kitchens and Multi-Brand Cloud Kitchens

Cloud kitchens now go by various nomenclatures sometimes referred to as "ghost kitchens" or "dark kitchens," they are delivery-based restaurants, without dine-in areas. These facilities may concentrate mainly on food preparation for online customers by reducing the cost of a physical dining set-up such as furniture, interiors, staffing, and rent. The cost is diverted to digital marketing, food preparation, packaging and delivery. With a remote kitchen that can be set up in a commercial space, it offers flexibility and cost-effectiveness, and the approach is perfectly designed for the digital age [4]. With commercial property rental costs increasing at prime business locations, renting a place to set up a restaurant and a kitchen is expensive and labour-intensive whereas a

cloud kitchen has the advantage of building a remote kitchen that can be set up in areas that are low on rent and since only a commercial kitchen is constructed it is cost-effective. The food from a cloud kitchen can be delivered quickly to major business centres at all tiers in metropolitan cities, this is a big advantage, on the hind side, marketing will have to be extensive with overhead expenses also to consider [5]. According to the report by Red Seer [6] by 2030, the food industry in India is projected to grow at a market value of 10 to 11 percent, the current value as of 2024 is 79.5 billion dollars and this is only compromised of the organized sector and projected values of 20230 are at 144 to 152 billion dollars. The key drivers of this growth are due to the consumers' increased disposable income with more distribution of money towards leisure and convenience, implying more consumption of non-home-cooked meals, this gives way to a rise in preference for outside meals. The youth, especially in Tier-1 cities are choosing eating out for factors such as convenience, and special occasions. This change in dining preferences is also due to the surge of new brands entering the market. The organized market comprises 45-50% of the total market and is expected to grow faster than the unorganized market.

Difference between Single-Brand and Multi-Brand Cloud Kitchens

Single-brand kitchens focus on an individual style of cuisine whereas on the other hand, a multi-brand cloud kitchen has a range of cuisines that can be used. It was seen that there is a larger growth trajectory for multi-brand companies versus single-brand companies to scale up, this could be due to the diversity of food options rendered via multi-brands that are being offered, especially over various meal timings such as various brands under one umbrella offering a wide menu of options that caters to breakfast, lunch, dinner, beverages, snacks and desserts [6,7]. According to this report [6] within India, multi-brand companies have been able to scale two to three times more than in comparison to single-brand companies. Interestingly among the various multi-brand companies, the cloud-kitchen model tends to drive a faster growth trajectory which as per the 2024 financial year revenue report shows a 25 percent increase within cloud kitchens Growth in comparison to the 25 percent decreased sales of dine-in single brand companies.

With major multi-brand cloud kitchen players in the market within India are Rebel Foods, Curefoods, and Eatfit [6,7]. Many multi-brand companies such as Rebel Marketplace India Private Limited operate via multiple channels a website and a mobile application run under the banner Eat Sure [8].

Business Models in Multi-Brand Cloud Kitchens

According to the research paper by [7] there are several models on which cloud kitchens operate. The first type of cloud kitchen is the independent model that is commonly known as the original wherein it is the basic order online with delivery. In this model there is a specific cuisine offered and is aggregator dependent. The next model is termed brand house wherein a single kitchen operates with multiple brands of food focusing on online orders that offer a diversity of cuisines to choose from. This type of model is also aggregator-dependent but also operates its platform. In the Storefront Franchise model, there is a single brand in a single kitchen, but several outlets and a visible storefront where customers can takeaway, order online or dine-in also. Aggregator owned model is where there are multiple kitchens within a larger kitchen unit that is given on rent and is owned by an aggregator. Here, only the order and food delivery are carried out by the aggregator and the client is offered the rental space with basic facilities; to run the kitchen with equipment, staff, raw materials and menu all procured by the client. The aggregator-owned model is where the aggregators offer more support to the multiple partners, each of whom operates a rented kitchen space and all resources for operation are provided by the aggregator. This model also has a visible storefront so customers can place takeaway orders. The last model is the fully outsourced model where all resources are outsourced here chefs only do the final touches and finishing called the

Kitopi model. On the other hand, Cloud Kitchen by [9] describes cloud kitchen models in the Middle East as full-stack cloud kitchens, business-to-business models, virtual restaurants and virtual brands.

2.2 Evolution of the Food Service Industry

Shift from Traditional Dine-In vs. Takeaway vs. Food Delivery Models

According to Ma et al. [10] restaurants are seeing an increasing shift in consumer preference from dining out to now dining-in through online orders and delivery of food, this change in consumer behaviour is due to the influence of digital technology and food aggregator business. The paper addressed that now restaurants prefer a blended model for business, so as to increase revenue opportunities and stay competitive in the market. The cloud kitchen business is a lucrative approach to address the changing demands of the consumer and this phenomenon is seen from a global perspective.

Internationally the cloud kitchen market, for instance, large companies like Amazon have invested millions of dollars into the U.K. scale-up Deliveroo. This showcases the potentiality that lies in the trend, with restaurants that can be set up in any location with only a small initial capital the market for this disruptive model has increased and is on the rise [11].

In India on the other hand there are two dominant players in the food aggregator business Zomato and Swiggy, but other rivals do exist such as Rebel Foods, Eatfit and so on [6,7,8] hence the cloud kitchen market is expanding within the country.

Technological Advancements in Food Service

Technology has had a tremendous impact on the food industry for example the case study by [12] examines the multi-brand cloud kitchen by Rebel Foods, a food services company founded in India. The various cutting-edge technologies that Rebel Foods might use to boost productivity, foster customer engagement, boost sales growth, and gain profitability, include blockchain, augmented reality (AR), robotic process automation (RPA), machine learning (ML), and artificial intelligence (AI). This is just an example of one such cloud kitchen company incorporating the latest technology for the development of its business, the introduction of Artificial Intelligence has now given space for new growth in the business. The study on the food service sector in Spain also showed similar results [13] where a digital transformation within the food service sector was well in progress before the pandemic but was greatly expedited by it. COVID-19 accelerated the digitalization of the food service industry by intensifying sales channels and expanding customer engagement. This paper further found that adapting to the latest technology has a major impact on the value creation and contributes to stakeholder interaction.

2.3 Consumer Behaviour in Food Delivery and Online Ordering

Over the past decade, consumers have increased their usage of technological platforms. Technology alone would not be enough, as the study [14] suggests that value is only created through its commercialization. By using technology to establish creative business models, a company can increase its profits. But technology isn't really useful on its own. Technology creates value. Technology and its adoption will be crucial to the long-term viability of organizations pursuing innovative business models [15].

This blend of technology and consumer preference has spurred the trend of the online food business and it has been steadily increasing, with this ease of access within the palms of the consumers. According to a study in Jordan with the increase in online food delivery, the consumers mostly order fast food which was the most popular choice in comparison to choosing a healthy meal. The

study concludes with the notion that online food delivery apps can be a great influence on consumers to promote eating healthy meals. The main apps used in the Middle East are Talabat, Noon, Uber Eats, and Careem [16]. There is very sparse literature available on the various other dimensions of consumer behaviour influences on online food delivery in multi-brand cloud kitchens which is the key research gap identified by this paper.

So, the food business has a few challenges to deal with, in offering quick and quality food delivery services, preparing with hygienic and safety protocols within food production and packaging, meeting consumers' demands and expectations, good marketing and operating standards all and more parameters have to be achieved to ensure continuous sales and profit in a competitive environment. Hence the benefits of the multi-brand cloud kitchens are reshaping competition and business operational model.

3 Research Gap

Cloud kitchen as a concept is relatively new and is a trend that is fast catching up but the research in this area is significantly low due to its novelty. With the emergence of various new models to compete with market trends even less literature is available calling for the need to fill the research gap within the specific business model of multi-brand cloud kitchens. Hence this paper is aimed at identifying the reason for the trend shift from dining out to dining in phenomenon by exploring the cloud kitchen dimension with specific attention to multi-brand cloud kitchens. The review builds upon prior research by synthesizing fragmented findings and introducing a comparative lens between traditional, single-brand, and multi-brand models. For instance, while Lahiri et al. [12] emphasize the technological backbone of Rebel Foods, this study expands on the consumer-facing impacts of such innovations.

4 Research Methodology

4.1 Research Design

A systematic literature review (SLR) methodology is used in this study to compile the body of knowledge regarding multi-brand cloud kitchens and how they affect consumer behaviour. Systematic literature review ensures a structured, transparent, and replicable approach to reviewing existing literature, minimizing bias and enhancing the reliability of findings. The review process involved identifying relevant academic and industry sources, defining inclusion and exclusion criteria, and organizing the data for thematic interpretation. This evaluation of scholarly and commercial sources offers a complete grasp of the changing trends and challenges faced in the cloud kitchen market.

4.2 Data Sources

The study incorporates data from multiple sources to ensure a holistic analysis of the literature. The primary sources include:

Peer-Reviewed Research Papers

Articles published in high-impact academic journals related to hospitality management, food service innovation, consumer behaviour, and digital business models.

Case Studies

Detailed reports on specific cloud kitchen brands, including their strategies, operational models, and market performance. These provide real-world insights into the business model's effectiveness and challenges.

Industry Reports

Market research studies, white papers, and publications from consulting firms (such as McKinsey, Deloitte, and Redseer Strategy Consultants) that analyse trends in food service, digital ordering, and consumer preferences.

4.3 Analysis Approach

The collected literature is analysed using thematic analysis, a qualitative approach that identifies, organizes, and interprets recurring themes within the research findings. Thematic analysis was conducted with initial data familiarization conducted by reviewing all selected sources to gain an initial understanding of key topics. Then the data was coded by categorizing literature findings into key themes such as consumer behaviour trends, operational efficiency, market challenges, and technological advancements.

Data Familiarization

Initial reading of data sources to identify key patterns and trends.

Coding

Categorization of findings into dominant themes such as operational efficiency, consumer preferences, market dynamics, and technology integration.

Theme Development

Identifying patterns and relationships among themes to draw meaningful insights. These themes were then further assessed to derive interrelations to further derive into building an analytical narrative finding of the study.

Critical Synthesis

Integrating findings to highlight gaps in existing research, emerging trends, and potential future directions for the cloud kitchen industry.

5 Findings of the Study

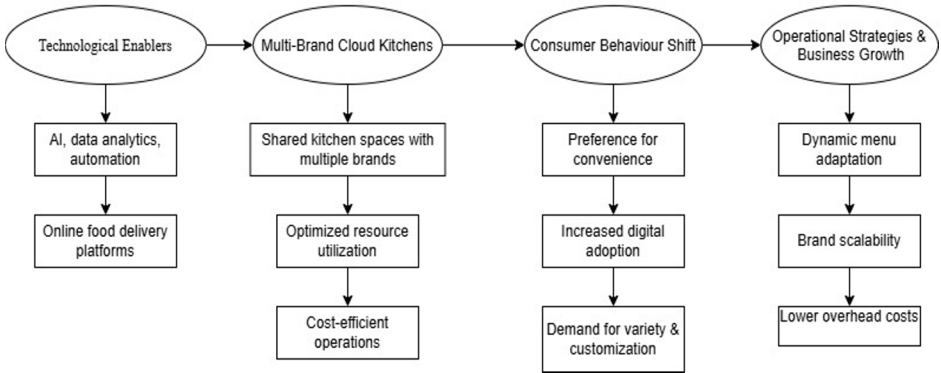


Fig. 1. Critical focus areas for future growth of multi-brand cloud kitchens

The findings of this study are elaborated thematically after the detailed literature review and the following four themes were identified and are discussed below the same is also represented in Figure 1.

5.1 The Future of Food is Technology-Driven

Cloud kitchens are powered by digital platforms, real-time analytics, and AI-driven demand forecasting. This theme echoes DaSilva et al. [13], who emphasized the role of disruptive technologies in reshaping business models. The food and beverage business is renowned for offering products available to consumers on various digital forums other than physical dining in restaurants. Use of mobile applications or websites, through social media, food aggregators such as Zomato, and Swiggy, the multi-brand cloud kitchens are also available for purchase on independent platforms, such as EatSure, Kouzina, Curefood, Box8 [6,7,8] and so on, wherein consumers order food online and the product is delivered. The technology-driven attraction factors that draw consumers to online food delivery are numerous, with convenience being a major element in buying food [16]. With artificial intelligence (AI), chatbot assistance, and augmented reality (AR) the scope that can be explored is seemingly limitless. Food scientists are continuously innovating the scope of food technology by improving upon food products and even better-existing food products. The areas that are expanding further are developing packaging, processing and preservation techniques that can improve food quality and accessibility [17]. With the added advantage of artificial intelligence, the business can be streamlined with personalization of products, chatbot assistance, fraud detection, optimized search results, aid in restaurant planning and listing as well as inventory management [18]. These are all areas that can be explored by the cloud kitchen business concerning the technological investments to adopt in the business.

5.2 Strategic Growth of Multi-Brand Cloud Kitchen

One of the main forces that drove the origin of the multi-brand cloud kitchen is consumer demand according to the statement made by Rohan Agarwal, partner at Redseer Strategy Consultants [19] Customers are becoming more adventurous and expecting a wider range of cuisines. Cloud kitchens may develop particular brands that adapt to the changing tastes and preferences of consumers and

grow them more quickly than traditional dine-in settings because of their plug-and-play, scalable, and cost-effective model. Several cloud kitchens also use acquisitions as a major growth tactic, which promotes growth for both the acquired brand and the cloud kitchen at generally reduced expenses. For cloud kitchens, both of these tactics are anticipated to develop further in the near future. Therefore, having various cuisine options is a demand by the consumers. Thus, the multi-brand cloud kitchens' main offering is shared kitchens with maximized use of resources, where multiple menus with cuisine options can be delivered, this would lead to being able to meet the growing and changing demands of the consumers.

5.3 Impact of Consumer Behaviour Shift on Multi-Brand Cloud Kitchens

Examining consumer behaviour is essential in a business to develop result-oriented marketing and selling strategies [20]. Branding is the basis of consumer decision-making [21], according to the paper by Anand, 2023, the crucial component of marketing and consumer behaviour is brand awareness, which is the degree to which customers can recognize and recall a brand, which is an element that needs to be researched in the concept of multi-brand cloud kitchen as would be a confusion in the minds of the consumers with so many brands. An increased preference for delivery over dine-in has been the change element in consumer behaviour with, consumers seeking diverse cuisines under one platform. Examining consumer behaviour is essential in a business to develop result-oriented marketing and selling strategies [20].

Branding is the basis of consumer decision-making [21], according to the paper by Anand, 2023, the crucial component of marketing and consumer behaviour is brand awareness, which is the degree to which customers can recognize and recall a brand. Hence the role of targeted digital marketing and AI-driven personalization will be the need of the hour for driving business sales and building a brand image for the customers. According to Thangasamy and Patikar (2014) [22] marketers need to determine who makes the purchasing decisions to comprehend how customers make them. Additionally, they ought to keep a close eye on the kinds of purchases that are made and the procedures that members of a social unit (family) go through while making decisions. Depending on the kind of purchase and the goods, consumers make different decisions. The choices to purchase and decision-making have to be explored by multi-brand cloud kitchens. The term "marketing" is not a recent phenomenon, on a global scale it is now the centre of attention for any company according to Thangasamy and Patikar [22]. Post-pandemic consumers prioritize convenience, speed, and variety, making cloud kitchens—especially multi-brand models—more appealing. The study aligns with findings from the research paper [3], who highlight perceived benefit-risk trade-offs influencing ordering behaviour. Therefore, marketers have to constantly base their product planning and development strategies on research studies regarding the ever-changing behaviour of consumers. These are mainly studies conducted on consumer behaviour in consumer goods but on service commodities the research is meagre.

5.3 Operational Strategies and Business Growth for Multi-Brand Cloud Kitchens

Multi-brand kitchens leverage shared infrastructure to reduce overhead costs. Compared to single-brand models, they demonstrate better resource utilization and scalability [2]. However, operational complexity increases with brand diversification. The cost reduction through shared infrastructure is the main operation advantage and it has to be maximised. With greater flexibility in menu design and branding, menu options must be explored and dynamic menu adaptation can be employed with changing menus based on changing preferences can be introduced so as to quickly adapt to market trends and consumer demand. With a multi-brand cloud, kitchen scalability is to be also explored by looking for remote kitchen outlets through the major centres in the metropolitan cities.

6 Conclusion

6.1 Challenges and Future Considerations

Despite their growth, multi-brand cloud kitchens face brand dilution, logistical issues, and regulatory uncertainties. Comparative analysis with traditional restaurants shows a trade-off between physical brand experience and digital scalability Ma et al. [10]. Digital advancements in the food industry have played a critical role in the growth of cloud kitchens and multi-brand cloud kitchens. There is indeed a bright future for the sector provided the very challenges along the path can be managed. Thematic analysis of this study reveals how multi-brand kitchens optimize resource use, adapt quickly to market demands, and redefine traditional restaurant dynamics. While the cloud kitchen business model offers numerous benefits, operational and regulatory tasks remain requiring business owners, researchers and policymakers to work towards maintaining consistent food quality across multiple brands, regulatory concerns surrounding food safety, understanding the market changes, labour practices, sustainability challenges and food waste management. Hence these are areas that require attention and there is a scope for further development. Multi-brand cloud kitchens therefore are progressively reshaping food delivery by optimizing resources and catering to changing consumer preferences.

6.2 Implications

For Restaurant Owners

There is a growing requirement for investment in data-driven decision-making, and having a customer database is crucial especially to make strategic decisions for the business.

For Policymakers

There is a need for updated food safety and labour laws, the concept of a single kitchen offering multiple foods has raised food quality concerns and the working hours of such kitchen with operational demand from the workers are also to be stipulated.

For Researchers

Future studies can be conducted to identify consumer loyalty and consumer buying behaviour within the brand differentiation that is there in multi-brand cloud kitchens.

6.3 Limitations and Future Research Directions

The study is limited to a literature review, future work can include consumer surveys or case studies. The long-term sustainability of multi-brand cloud kitchens remains an open question and the future is bright with statistics showing the steady rise of the cloud kitchen business.

The authors have no competing interests to declare that are relevant to the content of this article.

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