



Building beyond basics:
Innovations transforming
India's living spaces

September 2025



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Foreword

India is entering a defining chapter in its economic evolution. As the fastest-growing major economy globally, the country is witnessing a seismic shift in how its citizens live, consume and aspire. With over 300 million households, the demand for modern, functional and aesthetically appealing living spaces is rising across the country. This change is visible not only in metros but also in tier 2, tier 3 cities and rural areas, where exposure to digital platforms and rising incomes are reshaping consumption patterns.

The residential building materials and home improvements sector is at the heart of this transformation. Categories such as furniture, electricals, paints, wood panels and flooring are no longer viewed just as functional necessities but as expressions of lifestyle, identity and aspiration. The sector is projected to post a ~9.6 percent CAGR over the next five years, reaching over US\$160 billion by FY30. Consumers increasingly seek smart, sustainable and personalised solutions that align with their evolving values and expectations.

Government policies have further supported this momentum. Initiatives such as Pradhan Mantri Awas Yojana, the Urban Infrastructure Development Fund and digitisation of land records have enhanced transparency, streamlined transactions and expanded access to affordable housing. These structural enablers are establishing a strong foundation that encourages innovation, attracts sustained investment and promotes inclusive growth across the building materials and home improvement sectors.

The 56th GST council meeting recommended reducing the GST rates on certain items, including furniture, home decor, tiles, paints, electrical fittings and construction materials. Under the anti-profiteering provisions, the government has mandated that the benefit of GST rate reductions be passed on to citizens. As a result, items in these categories will see a decrease in MRP, which is expected to drive demand.

Technology is driving this change by reshaping both products and customer experiences. People now expect a seamless blend of online discovery and in-store validation, making omnichannel engagement the new standard. Immersive customer experience centres are emerging as key touchpoints for high-involvement purchases. Sustainability is now a mainstream expectation. Consumers actively seek green-certified products, energy-efficient solutions and brands that demonstrate environmental responsibility across their value chains.

While the long-term growth outlook is robust, some segments face near-term challenges. Muted demand, volatility in raw material prices and fluctuating margins exert pressure on businesses, requiring a sharper focus on efficiency, resilience and adaptability.

This report offers a strategic lens into this evolving landscape. It synthesises market trends, consumer insights and growth imperatives across key categories, providing actionable intelligence to navigate complexity and unlock opportunity. As leaders chart the future of their organisations, this report serves as both a compass and a catalyst, highlighting the need to harmonise scale with personalisation, efficiency with empathy and innovation with purpose.



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Introduction

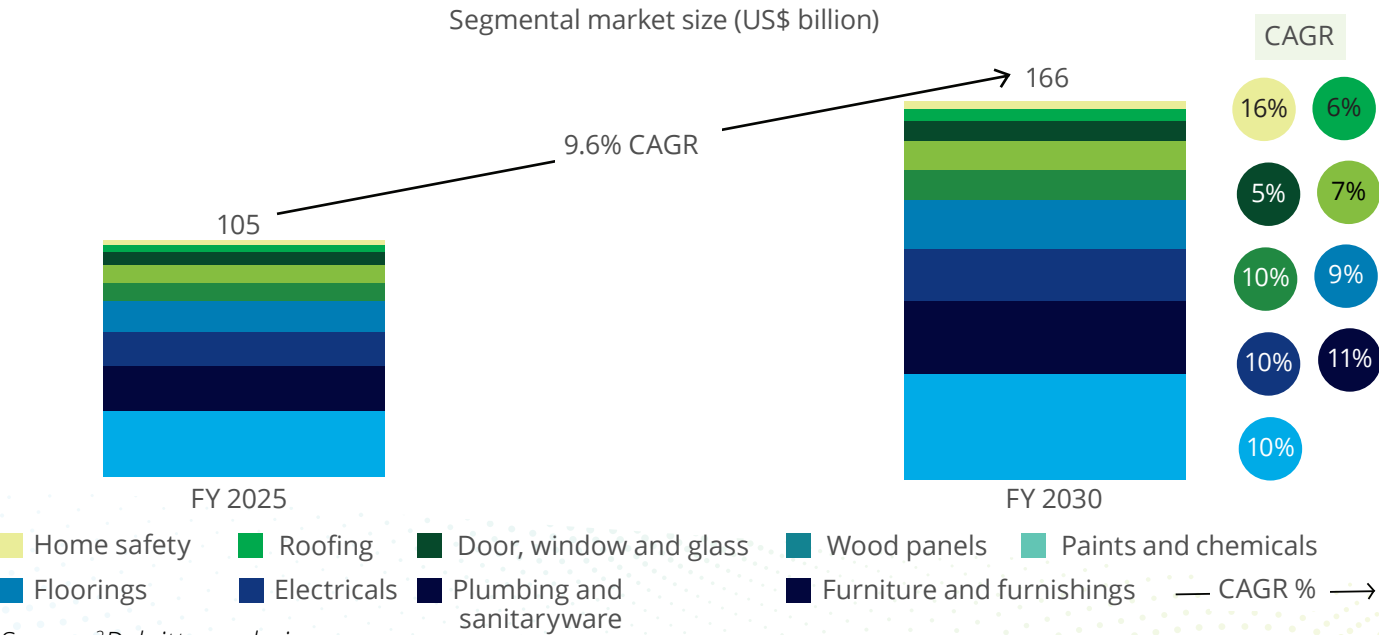
India's economy continued to grow at a solid pace, holding its spot as the fastest-growing major economy globally. Real GDP growth was estimated at ~ 6.5 percent in 2024–25.¹ The Indian residential construction industry, contributing ~ 7 percent to the GDP,² grew 6.8 percent during this period.³

Several measures taken by the government, including Pradhan Mantri Awas Yojana (PMAY), the Urban Development Plan and the digitisation of land records, have created a conducive environment for growth by enhancing transparency, streamlining property transactions and providing affordable housing options. The sector is rapidly integrating AI, IoT, BIM, AR/VR and prefabrication, improving efficiency, transparency and delivery speed.

This report focuses on the residential sector of the building materials industry, specifically the period after construction and before residents occupy the buildings. India's construction industry is driving a surge in demand for related sectors such as furniture, electricals, paints, plumbing and flooring.

The expansion of residential and commercial spaces directly fuels consumption in these categories, with consumers increasingly seeking integrated, premium, smart and sustainable solutions that complement modern living spaces. Collectively, these industries form a critical value chain supporting the real

estate ecosystem, reinforcing the sector's multiplier effect on the broader economy and positioning India for sustained growth in housing and urban infrastructure.



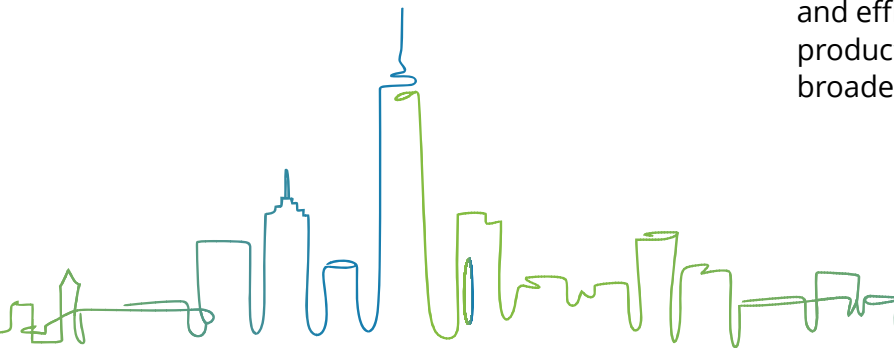
Growth drivers

- **Urbanisation and nuclear families:** Urbanisation in India is expected to hit 40 percent by 2030, with the urban population almost doubling to 951 million by 2050. With over 50 percent of Indian households being nuclear families, the country will need more than 144 million new homes by 2070 to meet growing demand.
- **Rising spending power:** Middle-income households are growing by 6.3 percent annually; Gen Z will drive 43 percent of consumption by 2025, which will total US\$250 billion.
- **Premiumisation wave:** Economic forecasts suggest that the number of super-rich households in India will increase fivefold from current levels to reach 9.1 million by

2030–31, and further rise to 32.7 million by 2046–47. Premium demand is also expected to grow beyond metros.

- **Government policy measures:** Income tax rate reductions, easier monetary policy and schemes such as UJALA are helping boost demand for quality building materials. The Urban Infrastructure Development Fund (UIDF), which will provide US\$1.2 billion annually to improve infrastructure in tier-2 and tier-3 cities, is expected to further support this growth.
- **Smart homes:** The smart home market in India is expected to post a CAGR of approximately 30 percent between 2025 and 2030, fuelling growth for smart and connected electrical devices.

- **Faster makeover cycles:** Renovation timelines have shortened to 10–12 years as preferences evolve rapidly.
- **Construction and real estate boom:** The Indian residential construction sector, estimated at about US\$252 billion in FY2025 and expected to reach US\$350 billion in FY2030, is a strong propeller for the home and household market.
- **Rising disposable income:** India's per capita disposable income is projected to reach US\$4,340 by 2029, up from US\$2,540 in 2023. This growth in disposable income is driving changes in consumer spending patterns and enhancing overall purchasing power.
- **Technology and innovation:** Innovations in design and the adoption of advanced manufacturing techniques have enhanced product quality and efficiency, making wood products more accessible to a broader audience.



⁴The Hindu Business Line

⁵India has a critical opportunity to drive resilient urban development, says new World Bank report

⁶<https://www.fibre2fashion.com/news/retail-industry/gen-z-to-drive-2-trn-in-spending-by-2035-in-india-report-298670-newsdetails>

⁷<https://www.financialexpress.com/policy/economy-india-to-have-billion-plus-middle-class-by-2047-study-3157931/>

⁸National housing bank

⁹Mordor Intelligence

¹⁰<https://www.praxisga.com/PraxisgaImages/Reportimg/what-s-shaping-the-indian-home-interior-market-Report-3.pdf>

¹¹Mordor Intelligence

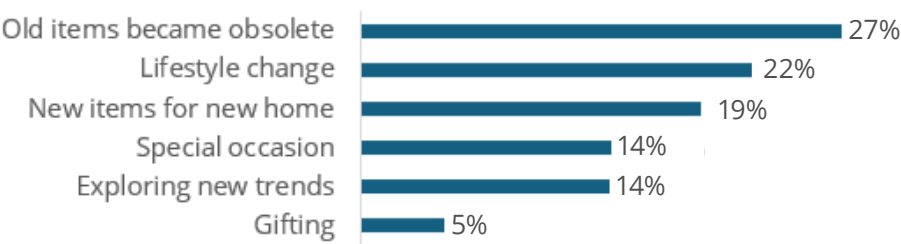
¹²IBEF.org

Voice of the consumer

Rising disposable incomes, aspirational lifestyle upgrades and demand for smarter homes drive consumers towards branded, functional and aesthetically appealing home and household products. A recent consumer survey by Deloitte delves deeper into evolving consumer preferences and spending patterns.

Reason to purchase/replace home and household products

About 50 percent of new item purchases are driven by either old items being obsolete or lifestyle upgrades, indicating growing consumer preference towards staying current with home and household trends.



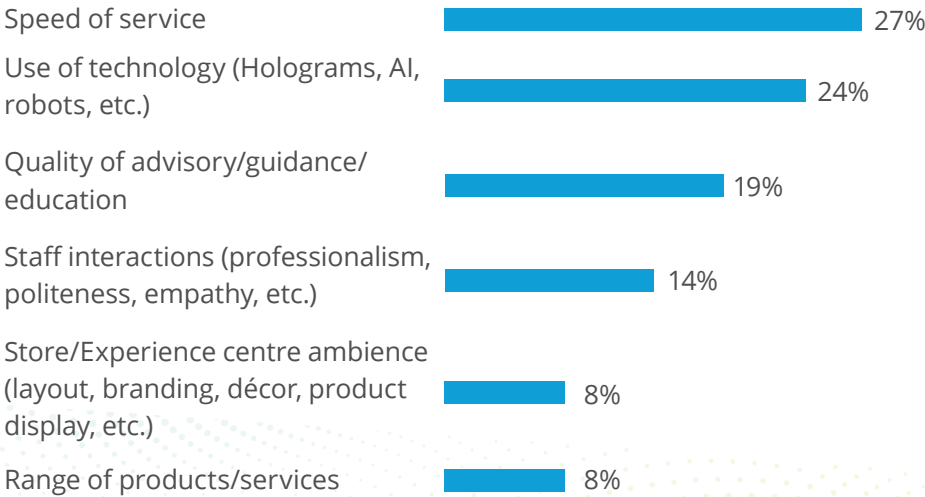
Channel preference

Most respondents (46 percent) prefer purchasing home and household materials from branded retail stores. The trends remain consistent in metro and non-metro cities.



Factors contributing to a great in-store experience

Respondents identified product variety and the ambience of stores or experience centres as the key factors that define a great in-store experience.

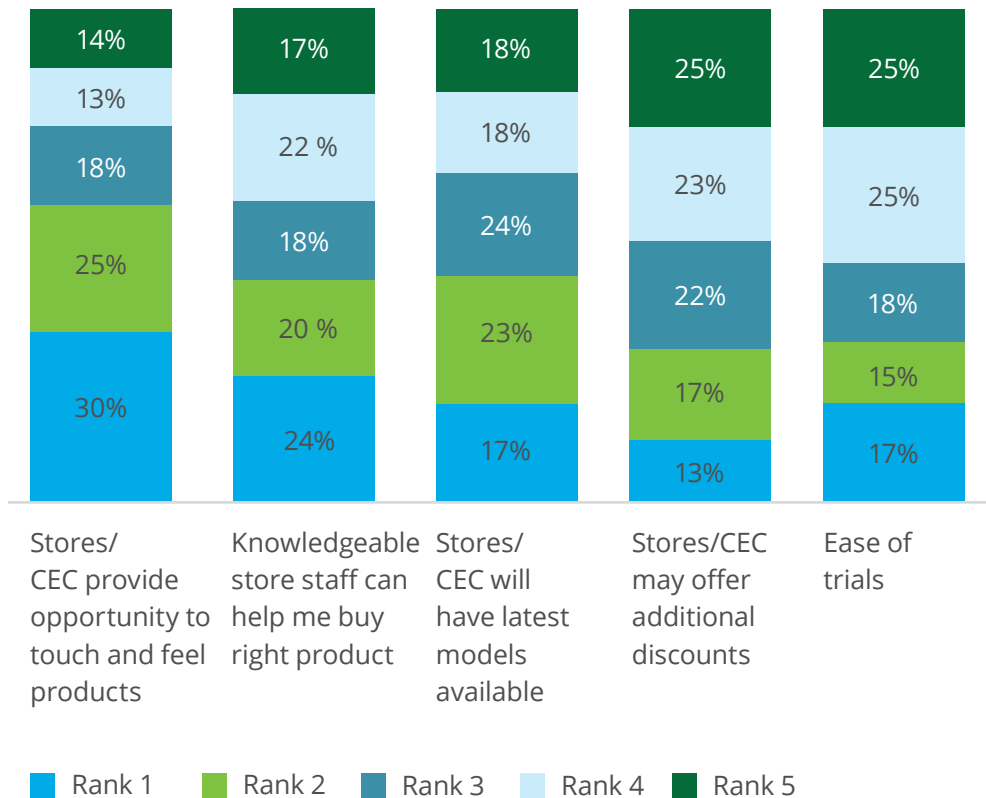


Growing preference for Customer Experience Centres (CECs)

About 86 percent of the respondents expressed interest in visiting a CEC for high involvement categories, citing the ability to physically engage with products and receive guidance from knowledgeable staff as key drivers.

(High-involvement categories require hands-on interaction and understanding of technical features, leading to more effort in decision-making. All categories except home chemicals (e.g., adhesives) and roofing materials were marked as high involvement.)

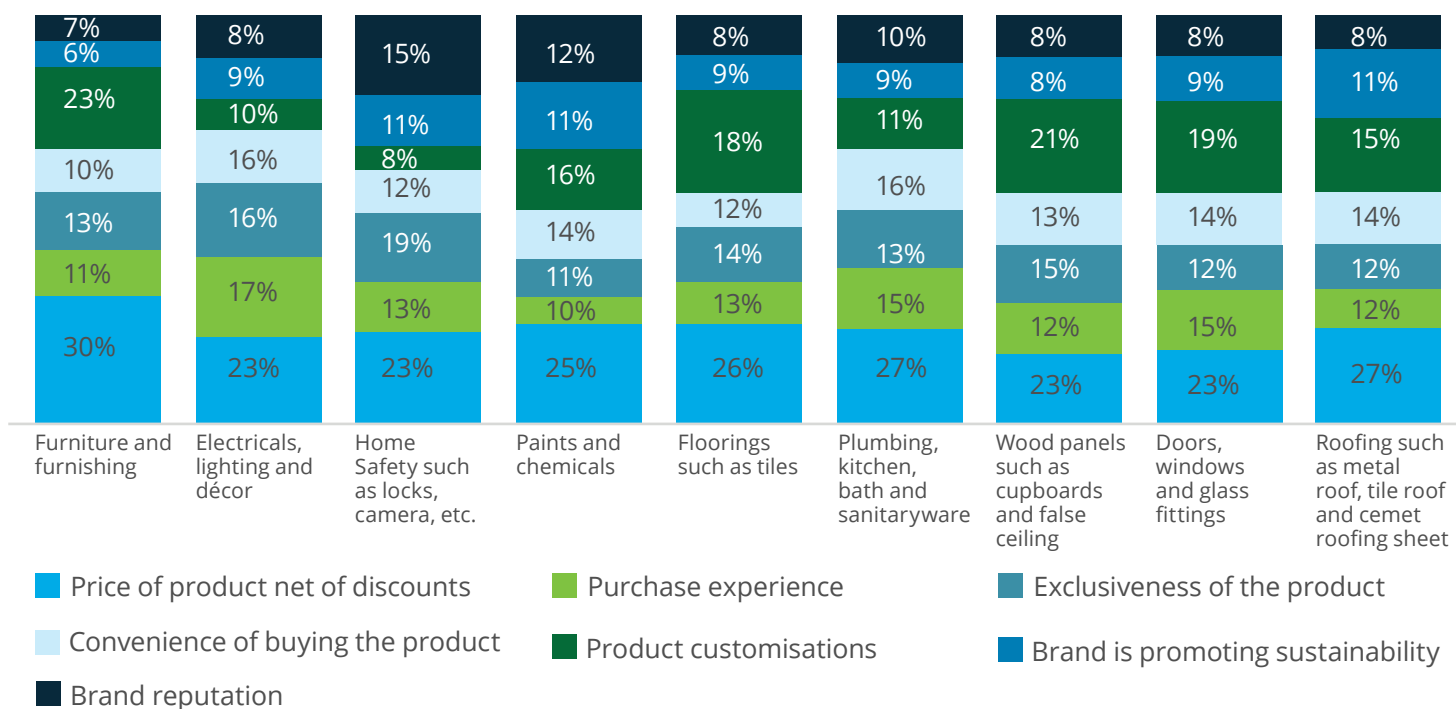
Factors driving respondents towards CECs



Purchase influencer by category

Only 25 percent of respondents, on average, marked price as a major influencer, indicating consumer preference for customisations, purchase experience, exclusivity of product and convenience of purchase.

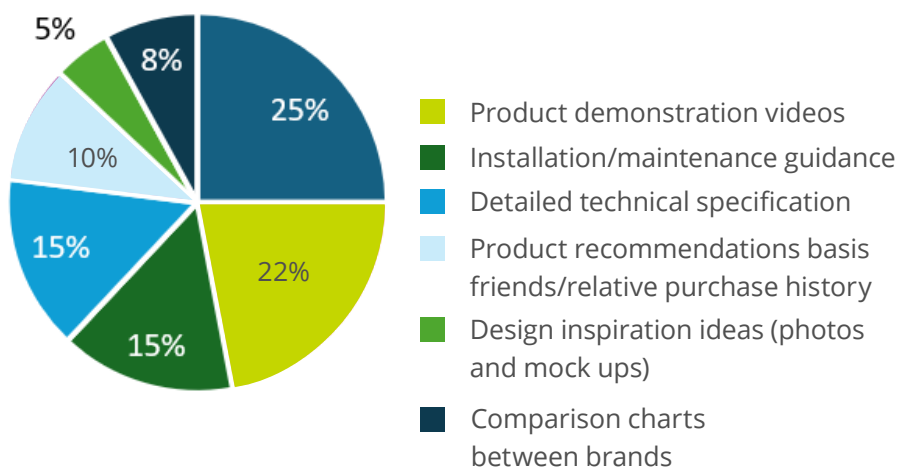
Purchase influencer by category



Factors driving product/brand selection

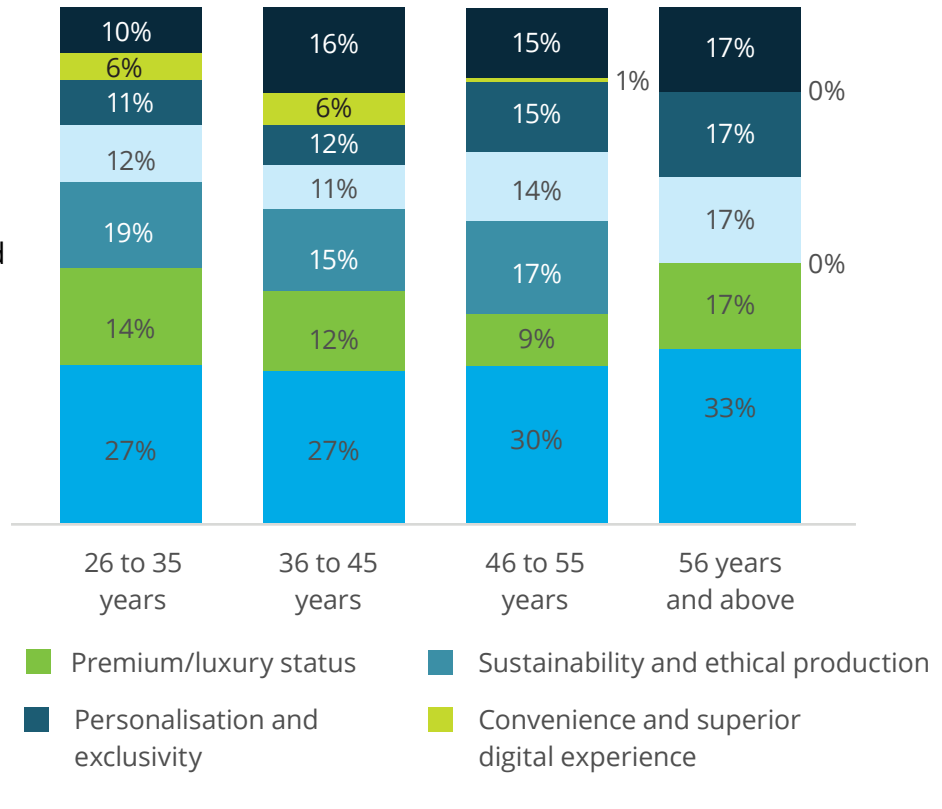
Customer testimonials and ratings available on the internet/website and product demonstration videos are major factors driving the customer's purchase decision of products/brands for high involvement and low involvement categories.

(High-involvement categories require hands-on interaction and understanding of technical features, leading to more effort in decision-making. All categories except home chemicals (e.g., adhesives) and roofing materials were marked as high involvement.)



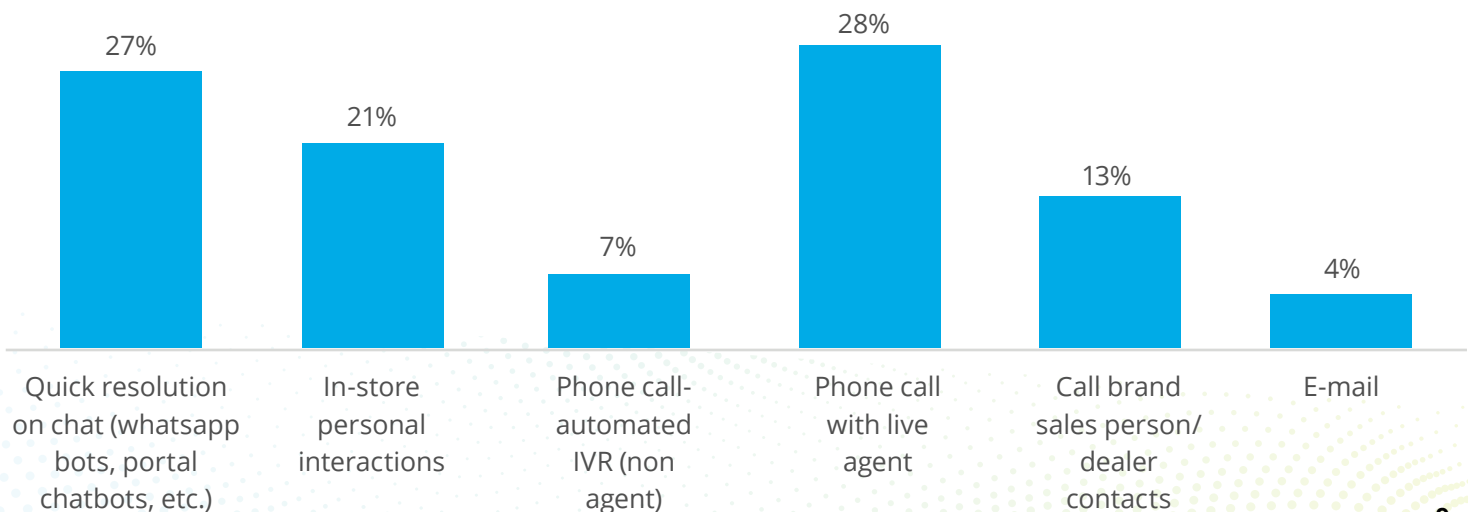
Factors driving willingness to pay a premium

Per the consumer survey, brand reputation, trust and sustainability are factors that drive most consumers to pay a premium for home and household materials. This trend largely remains consistent with age.



Mode of post-sales interaction

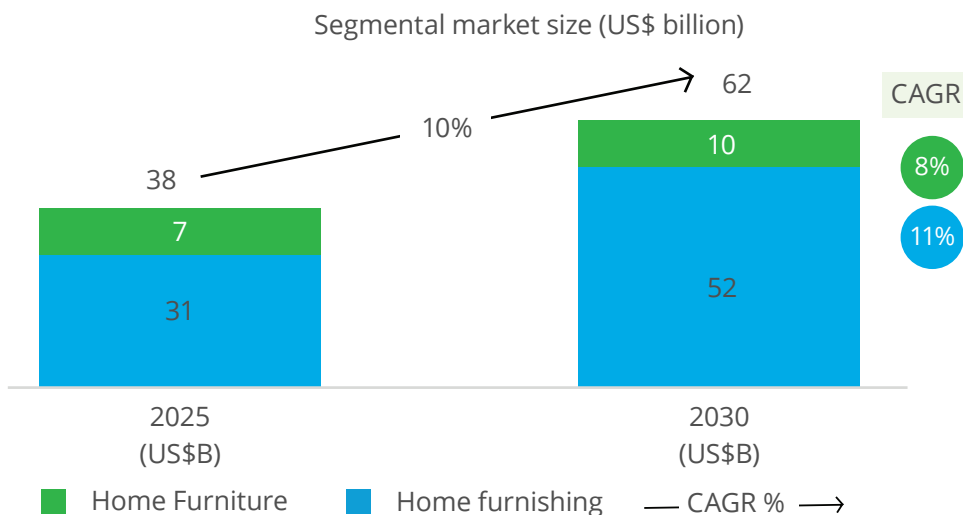
Human interaction mode holds the most value when considering preferences for post-sales interactions. Phone calls with live agents and In-store personal interactions account for almost 50 percent of the preferred mode of post-sales interactions.



Home furniture and furnishings

Market snapshot

India's home furniture and décor market is on a strong growth trajectory, driven by urbanisation, rising incomes and demand for stylish, functional and personalised spaces. Digital awareness, new age designs, convenience & utility trends are accelerating this shift.



Consumer trends

Lifestyle-driven spending:

Young, urban consumers with rising incomes prioritise premium and personalised home products.

Home as a lifestyle hub: Hybrid work has made homes the centre of life, boosting demand for utility, convenience and aesthetics.

Digital discovery and physical validation: Consumers browse online and experience offline before buying, making omnichannel a must.

Eco-conscious choices:

Preference for sustainable, ethically sourced materials is accelerating.

Influencer-led inspiration: Social media and design influencers shape purchase decisions, especially in tier-2 and tier-3 cities.

Product trends

Space-saving and modular:

Compact urban homes require multifunctional, ergonomic designs.

Smart and tech-integrated:

Automated and tech-enabled furniture is gaining traction.

Premiumisation: Shift from utility to design-led, branded and customised offerings.

Indoor living dominates:

Bedrooms and living rooms lead, accounting for ~41 percent of the market.¹³

Omnichannel growth:

Online surges with AR/VR tools; speciality stores thrive on curated experiences.

DIY and personalisation:

Consumers embrace DIY décor and customisable furniture for self-expression.

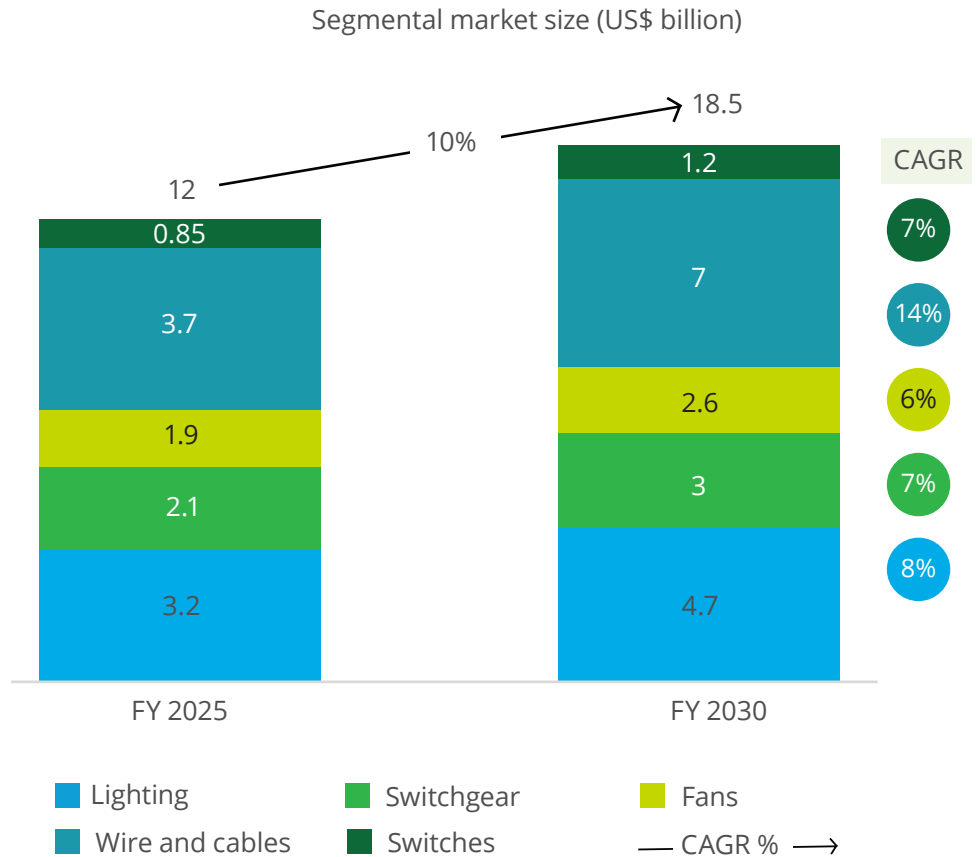


Electricals

Market snapshot

The Indian consumer electricals industry, consisting of residential wires and cables, fans, lighting, switches, fuses and switchgear, is set for steady expansion, driven by rapid urbanisation, infrastructure development, increased reliance on energy-based devices, policy support for energy efficiency and growing consumer demand for technologically advanced solutions.

The domestic electricals industry is pivoting towards branded play. The share of branded products in this industry has grown from 60 percent in 2015 to approximately 76 percent in 2023 and is projected to reach roughly 82 percent by 2027.^{14, 15}



Consumer trends

Energy-efficient devices: Driven by interest in energy-efficient technologies such as brushless direct current (BLDC) motors and IoT-enabled controls.

Strong summer-driven consumption spikes: Leading to increased uptake of energy-efficient fans, cool lighting and related products.

Energy based smart devices: Growing adoption of smart, modular, design-oriented switches, smart lighting and connected electricals.

Preference for experiential buying: Shifting towards immersive brand experiences through AR/VR, in-store visualisation and interactive displays.

Product trends

Energy efficiency: Increasing demand for energy-efficient appliances is driving higher consumption of LEDs (80 percent market share in the lighting sector),¹⁶ BLDC fans (15 percent market share within the fans market)¹⁷ and five-star rated appliances.

Smart devices: Rising interest in smart lights and fans controllable via voice, smartphones, remotes, Wi-Fi integrated devices and gesture-controlled switches.

Wi-Fi integration: Growing adoption of anti-viral switches and other devices with Wi-Fi connectivity, enabling remote control via smartphones.

Remote monitoring: Expanding use of smart wires with embedded sensors and IoT capabilities, enabling real-time monitoring of voltage, current, temperature and other key electrical parameters, along with real-time data transmission.

¹⁴<https://www.rrkabel.com/wp-content/uploads/2024/08/red-herring-prospectus.pdf>

¹⁵Deloitte analysis

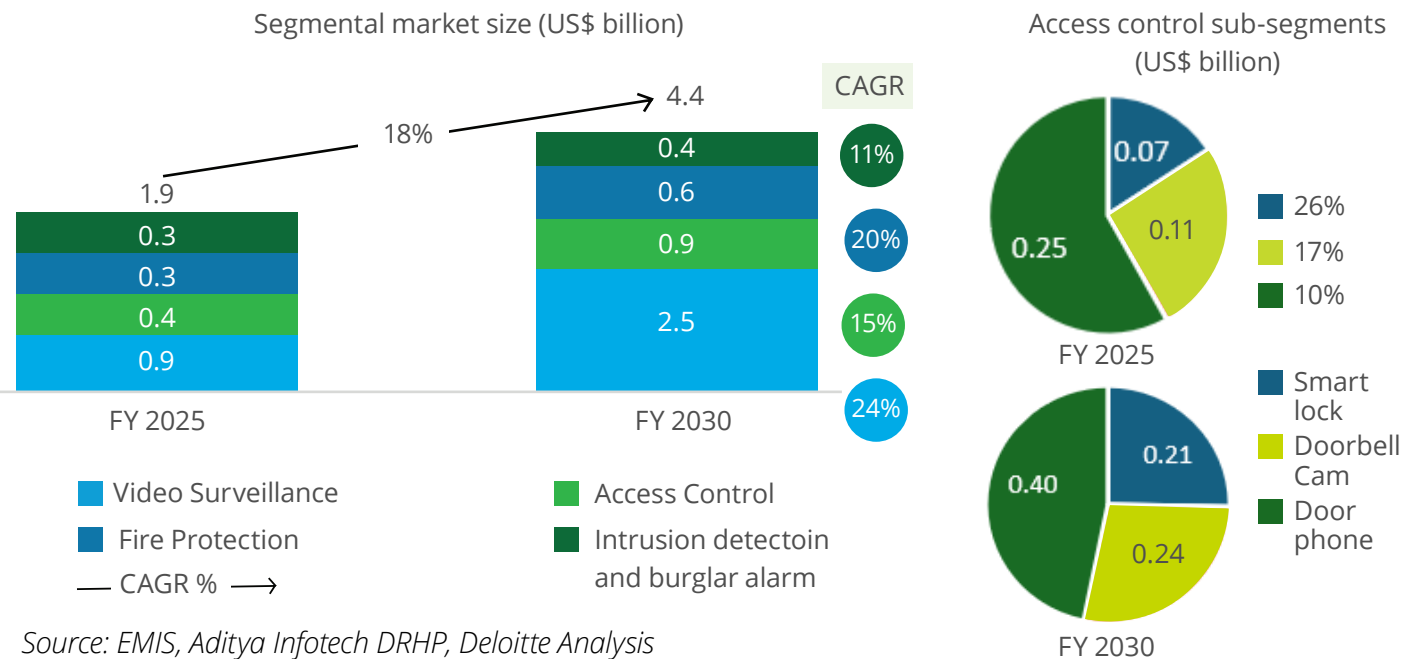
¹⁶Home and Household Report, Deloitte

¹⁷Value research online

Home security

Market snapshot

India's home security market is expected to post a 18 percent CAGR and is projected to reach ~US\$4.4 billion by FY30. The segment includes security cameras, smart locks, door phones, doorbell cameras, motion sensors and hazard prevention devices.



Source: EMIS, Aditya Infotech DRHP, Deloitte Analysis

Consumer trends

Security is the top consumer motivation: Indians are rapidly adopting smart-homes due to presence of security features (cameras, locks, alarms)

Bundling of smart security solutions: The security ecosystem is moving from standalone device sales to integrated, connected solutions.

Installation at the time of construction: Builders are pre-installing smart locks, doorbell cameras, etc., bundling them with other utilities in residential projects.

E-commerce aiding the availability: E-commerce is assisting consumers in easy product, price discovery and availability of security products, increasing adoption.

Product trends

Shift from analogue to IP cameras: IP cameras have redefined the surveillance landscape, as they offer better clarity, versatility and ease of use, indicating a significant shift in the industry

IoT integration and smart home ecosystems: Home surveillance devices are increasingly being integrated into broader smart home systems to create a unified, intelligent home

experience
Demand for remote monitoring: Users seek sophisticated surveillance systems that allow seamless remote access and real-time monitoring.

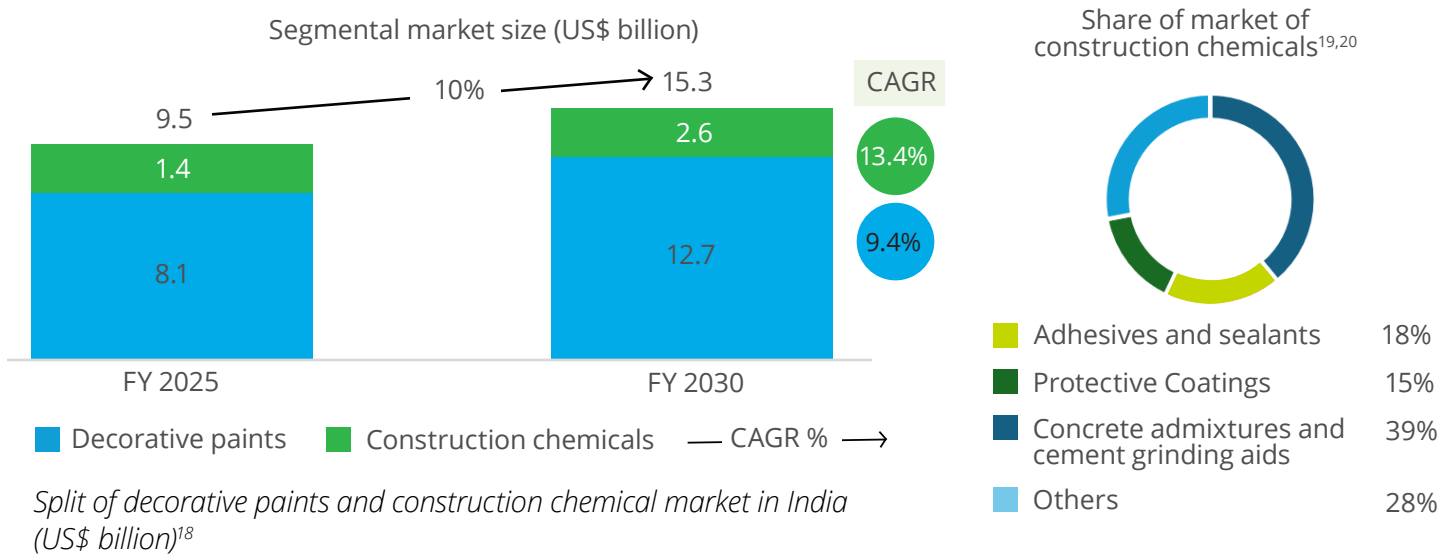
Emergence of cloud video surveillance services: Also known as Video Surveillance as a Service (VSaaS). It represents a strategic transition from traditional on-premises systems to cloud-based infrastructures

Rise of AI-driven video analytics: AI-driven video analytics algorithms enable advanced processing, real-time threat analysis with precision and reduce the burden of manual video observation through intelligent automation.

Paints and construction chemicals

Market snapshot

The paints and construction chemicals industry in India has emerged as a dynamic growth engine within the materials and infrastructure ecosystem. The sector is well-positioned to benefit from India's housing boom, infrastructure investments and consumer lifestyle upgrades, making it a critical contributor to the country's construction and urban development story.



The Indian decorative paints market is primarily driven by urbanisation, rising disposable incomes and expanding homeownership, with particularly strong demand emerging from tier-2 and tier-3 cities.

Consumer trends

Lifestyle-driven demand:

Rising disposable incomes and urban aspirations are fuelling demand for premium, branded and design-led decorative paints, as well as higher-quality waterproofing and construction chemicals.

Premiumisation beyond metros:

Social media influence and exposure to global lifestyles are driving consumers in tier-2 and tier-3 markets towards premium emulsions,

textured finishes and advanced waterproofing solutions.

Digital discovery and hybrid buying:

Immersive tools such as AR-enabled visualisation platforms are boosting customer engagement. Users explore up to 4X more colour options online.²¹ AR/VR-based visualisation tools and e-commerce platforms are shaping early product exploration, though final purchase decisions often rely on in-store validation and painter recommendations.

Rural market expansion:

Rural consumers have become an important growth segment, particularly for economy emulsions and basic waterproofing products.

¹⁸Report on Paints and Coatings Market in India 2025-2030 by Netscribes, <https://www.techsciresearch.com/report/india-decorative-paints-market/15145.html>, Report on India Construction Chemicals Market - Growth, Trends, COVID-19 Impact, and Forecasts (2023 - 2028) by Mordor Intelligence and Deloitte Analysis

¹⁹Market Size - FY 25 - <https://www.mordorintelligence.com/industry-reports/india-construction-chemicals-market>

CAGR - <https://www.alliedmarketresearch.com/india-construction-chemicals-market-A105694>

²⁰Others include Surface Treatment, Repair & Rehabilitation, Industrial Flooring, Waterproofing, and Grout & Anchor

²¹Roomvo data

Product trends

Decorative paints domination:

Decorative paints continue to account for nearly three-fourths of industry demand, with emulsions, distempers, enamels and textured finishes leading growth.

Segment diversification:

Companies are offering “low-medium-best” portfolios, ensuring affordability while simultaneously growing premium and smart-solution categories.

High-performance construction chemicals:

Waterproofing compounds, concrete admixtures, adhesives and protective coatings are becoming essential for new constructions and renovations, with waterproofing projected to experience the fastest growth by 2030.

Sustainability-linked solutions:

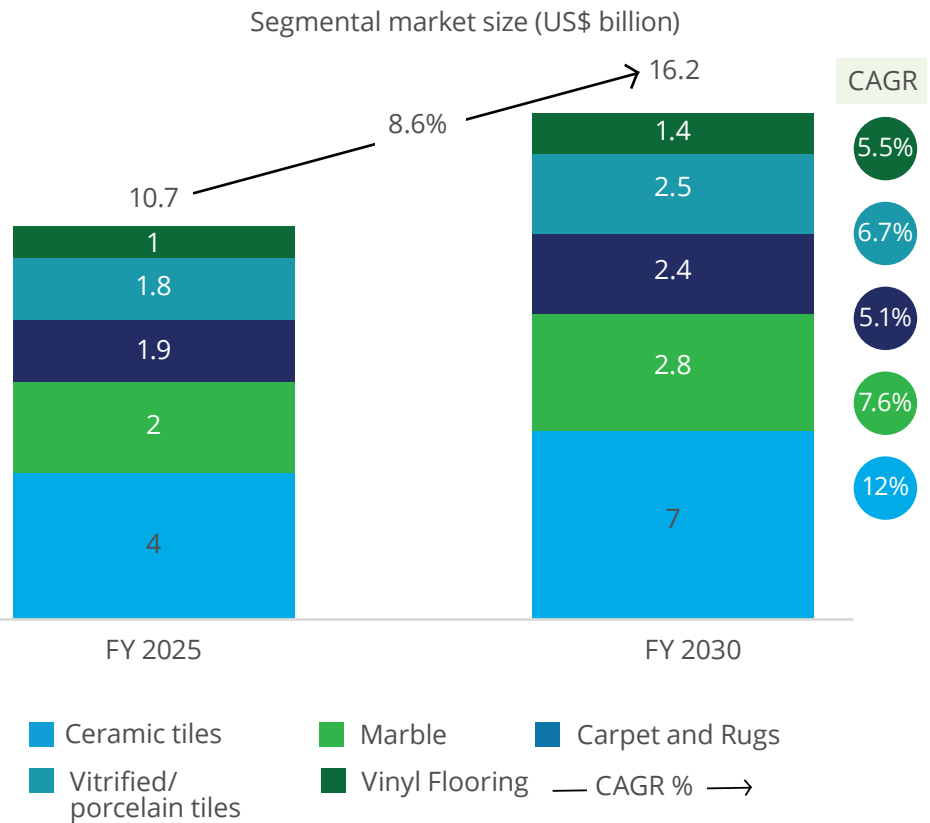
Bio-based coatings, recyclable packaging and energy-efficient chemical formulations are being introduced to align with ESG commitments and regulatory compliance.



Flooring

Market snapshot

India's flooring market comprises ceramic tiles, vitrified/porcelain tiles, vinyl flooring, marble and rugs. The ceramic tile market is seeing a weak retail demand and stiff competition within the domestic market due to sluggish exports. A revival is expected as exports and individual home building gain pace over the next few quarters. Ceramic tiles and marble are expected to grow faster than other categories, with their contribution projected to grow to 60 percent by FY30 compared with 56 percent in FY25.



Consumer trends

Premiumisation: A growing urban population and rising disposable incomes are driving preferences towards stylish, low-maintenance flooring such as vinyl (especially in mid-to-premium homes).

Low maintenance and durability: Consumers with children, pets or busy lifestyles seek flooring options that are easy to clean, scratch-resistant, waterproof and durable. Popular choices include engineered wood, high-performance laminates and porcelain tiles.

Utility-specific choices: In kitchens and bathrooms, consumers prefer the durability, easy maintenance and water resistance offered by ceramic and vitrified tiles.

Renovation driven by aesthetics: Renovation and improvement of older homes are driving demand for re-decorative tiles with premier finishes and designs.

Sustainability and eco-conscious choices: Consumers are increasingly choosing eco-friendly and green materials such as bamboo, cork, reclaimed/recycled wood, bio-based composites and recycled-content flooring.

Desire for customisation and digital visualisation: Consumers are embracing the ability to preview flooring in their own spaces using AR/AI visualisers and digital tools. Customisation

through digital printing, patterns and realistic visuals is enhancing consumer decision-making and design engagement.

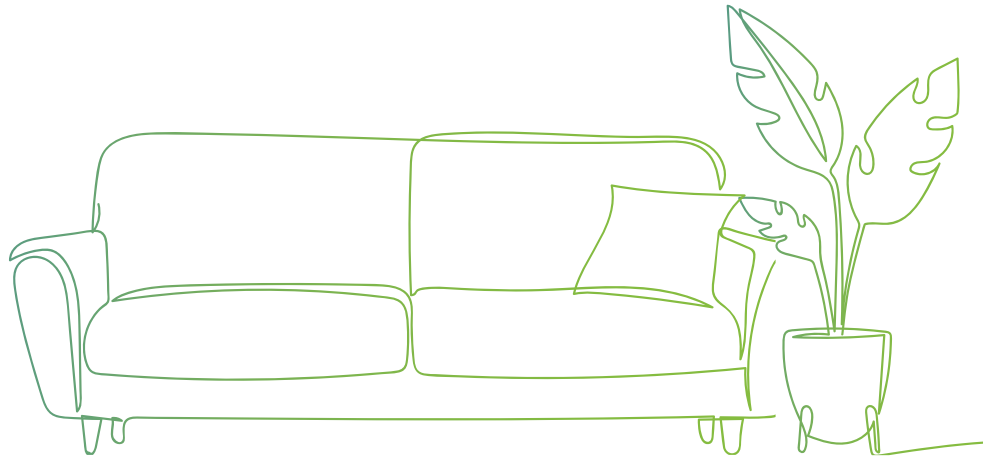
Product trends

DIY and convenient installations: Consumers are preferring value click-lock and loose-lay systems that simplify installation, reduce labour costs and allow modular replacements, making renovations easier, affordable and more accessible.

Technological innovation and design expansion: The industry's adoption of digital printing, rapid-firing, advanced glazing and 3D textures enables diverse designs, finishes and formats.

Source: EMIS, Kajaria Ceramics Ltd Investor Presentation, Deloitte Analysis

Smart, hygienic and technologically integrated flooring: Smart flooring features, such as heated floors, LED-embedded tiles and sensor-based systems, are trending in upscale, tech-forward homes. Antimicrobial and anti-slip finishes, especially in porcelain and vitrified tiles, are gaining popularity for improved hygiene and safety in high-traffic or wet zones.



Traditional and natural stone revival: Granite floors with checkerboard motifs, dual-tone borders, herringbone layouts and finishes such as polished gloss or leather texture are gaining popularity.



Plumbing, kitchen, bath and sanitaryware

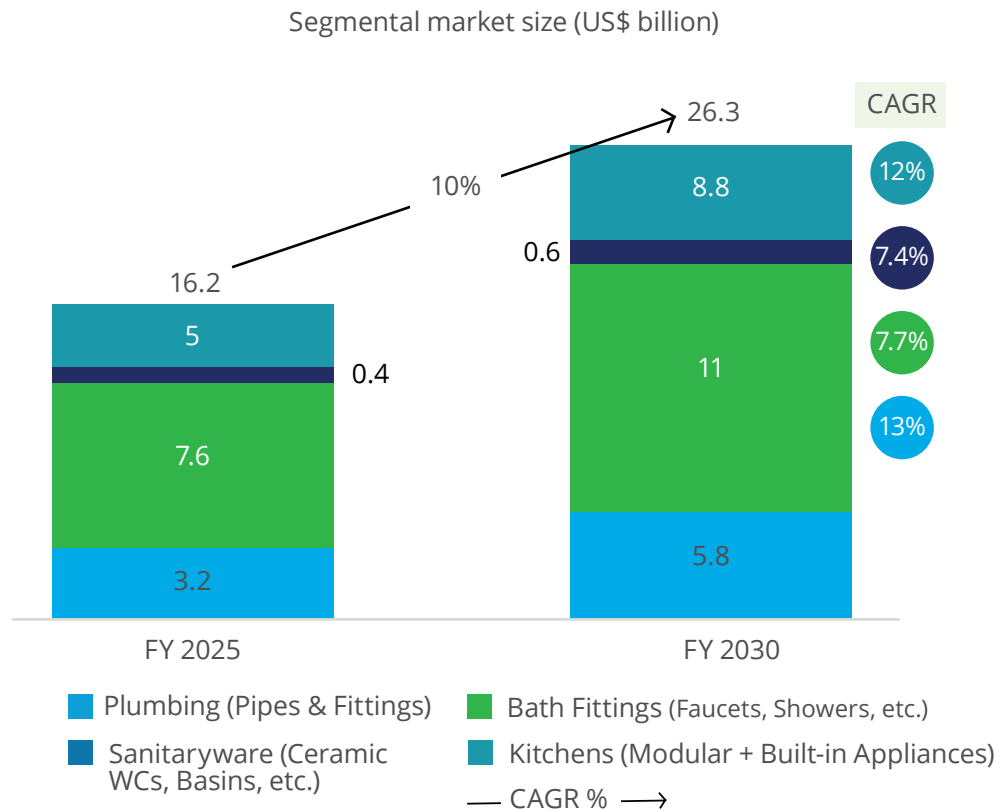
Market snapshot

The plumbing, kitchen, bath and sanitaryware sector has emerged as a significant component of the country's broader building materials and home improvement industry. This growth outlook is supported by multiple factors, including rapid urbanisation, continued government investment in housing and sanitation schemes, increasing consumer preference for modern and premium fixtures and the rising penetration of organised players across tier-2 and tier-3 cities. The market's trajectory underscores its transformation from a largely functional, price-driven category to an increasingly aspirational, technology-enabled and design-oriented category.

The plastic pipes segment was temporarily hit by early monsoons, lower infrastructure spending and weak resin prices, but the potential anti-dumping duty on imported PVC resin could prompt dealer re-stocking, boosting volumes and margins.

Consumer trends

Aspirational homeownership as a catalyst: Rising aspirations around home ownership are shaping consumer choices across plumbing, kitchen, bath and sanitaryware. Consumers are moving from functional solutions to branded, premium and design-led offerings.



Source: Sub-segment market size for plumbing, kitchen, bath and sanitaryware industry in India²²

Hygiene and sustainability awareness: Heightened concern for health, wellness and eco-conscious living drives demand for products that offer hygiene assurance, water efficiency and sustainable materials.

Lifestyle-linked spending: Rising disposable incomes and lifestyle aspirations are increasing willingness to invest in value-added solutions, shifting preference from price-driven to quality-driven decision-making.

Social media-driven aspirations: Digital platforms, lifestyle influencers and aspirational content are shaping preferences, particularly among urban millennials and tier-2 and tier-3 consumers. Aesthetics and modern designs are key purchase motivators.

²²Plumbing (Pipes & Fittings) - <https://www.techsciresearch.com/report/india-plastic-pipes-market/16656.html>
 Bath Fittings (Faucets, Showers, etc.) - <https://www.mordorintelligence.com/industry-reports/india-bath-fittings-market>

Product trends

Plumbing material upgrades:

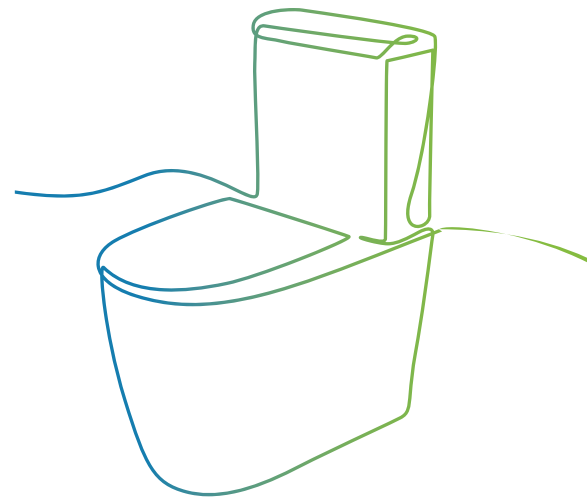
The industry is shifting away from Galvanised Iron (GI) pipes to chlorinated polyvinyl chloride (CPVC) and multi-layer composites, which are valued for durability, ease of installation and low maintenance.

Innovation in bath and

sanitaryware: Touchless faucets, rimless toilets, antimicrobial coatings and water-efficient dual-flush systems are gaining traction, aligning with hygiene and sustainability expectations.

Kitchens as design and

tech hubs: Modular layouts, integrated appliances, quartz sinks and handle-less finishes are increasingly in demand, turning kitchens into lifestyle and design statements.



Wood Panels

Market snapshot

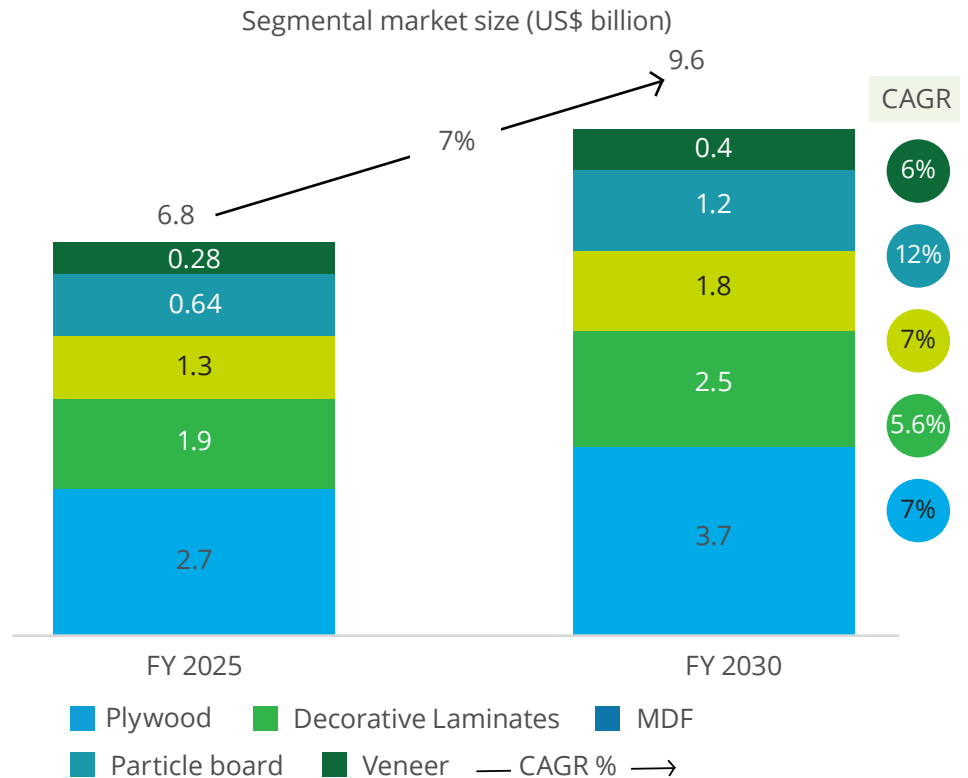
India's wood panel sector, including plywood, laminates, MDF, particle board and veneer, is experiencing rapid growth due to robust demand for furniture, modular construction and interior decor. The growth of modular kitchens drives the industry's expansion, reflects the shift towards organised players, aligns with evolving consumer preferences, meets sustainability goals and is influenced by green building certifications and ongoing technological advancements. Reduced imports of MDF due to stricter quality control may lead to short-term headwinds from intense domestic competition. Better capacity utilisation is expected to ease pressure and increase profitability.

Consumer trends

Sustainability: Consumers are prioritising flooring materials that are durable and environmentally responsible. Innovations such as reclaimed wood, bamboo and forest stewardship council (FSC) certified wood products are gaining traction in the market.

Preference for modular furniture: Growing adoption of ready-to-assemble and space-saving designs is driving use of standardized engineered wood panels.

Preference for customisation and aesthetic versatility:



Source: Centuryply annual report, Futuremarketinsights, IMarc research, Deloitte Analysis

Consumers are seeking personalised and unique flooring options, with a growing preference for customised wood panel flooring designs.

Product trends

Textured and 3D panels: Incorporation of depth through geometric patterns, grooves and textured finishes enhances the visual appeal of living rooms, TV units and lobbies.

Eco-friendly and sustainable materials: The use of reclaimed wood, bamboo and recycled panels aligns with the growing demand for green interiors.

Integrated ambient lighting and functional design: Engineered

panels with LED inlays, acoustic properties and mixed material layering to enhance both aesthetics and performance.

Technology integration: Smart wood flooring systems incorporating sensors, heating or cooling capabilities are becoming more popular, particularly in smart homes. These systems can be controlled remotely via smartphones or home automation systems.

Increased adoption of engineered wood panels: Resistance to moisture, durability and cost-effectiveness make them ideal flooring materials for various applications.

Doors, windows and glass fittings

Market snapshot

India's doors, windows and glass fittings industry represents a vital segment of the country's building materials and home improvement landscape. The industry's trajectory signals a transition from basic, functional installations to design-led, performance-oriented and technology-enabled solutions. With the growing adoption of smart glass, automated door systems and customised façades, the sector is evolving rapidly.

Combined with increasing influence from architects, OEMs and organised channel collaborators, it is poised to play a central role in shaping India's modern built environment.

Consumer trends

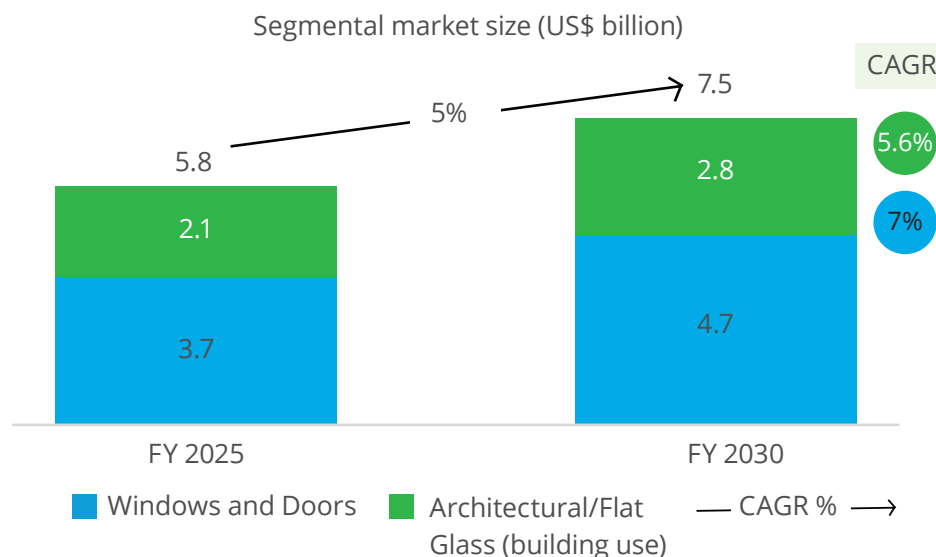
Shift in preferences

towards modern materials:

Homeowners are increasingly moving away from traditional wooden fixtures to uPVC and aluminium options, which are seen as more durable, low-maintenance and better aligned with contemporary lifestyles.

Safety and comfort orientation:

Consumers are placing higher importance on safety, acoustic insulation and thermal comfort, making laminated, toughened and insulated glazing preferred choices in both residential and commercial projects.



Sub-segment market size for doors, windows and glass fittings Industry in India²³

Design and lifestyle aspirations:

Minimalistic, sleek designs with large-glazed openings and floor-to-ceiling windows are gaining traction, particularly among urban millennials and aspirational tier-2 and tier-3 households who value modern aesthetics.

Premiumisation and lifestyle spending:

Rising disposable incomes and exposure to global design trends encourage consumers to invest in branded, high-end and design-led solutions, signalling a clear shift from purely functional to lifestyle-driven decision-making.

Sustainability awareness:

Eco-conscious consumers are increasingly opting for energy-efficient products such as double-glazed and low-E coated glass, reflecting a broader

shift towards sustainable and environmentally responsible living.

Product trends

Material transition to uPVC and aluminium:

The market is shifting from traditional wooden frames to uPVC and aluminium systems, valued for their durability, thermal and acoustic insulation and ease of maintenance.

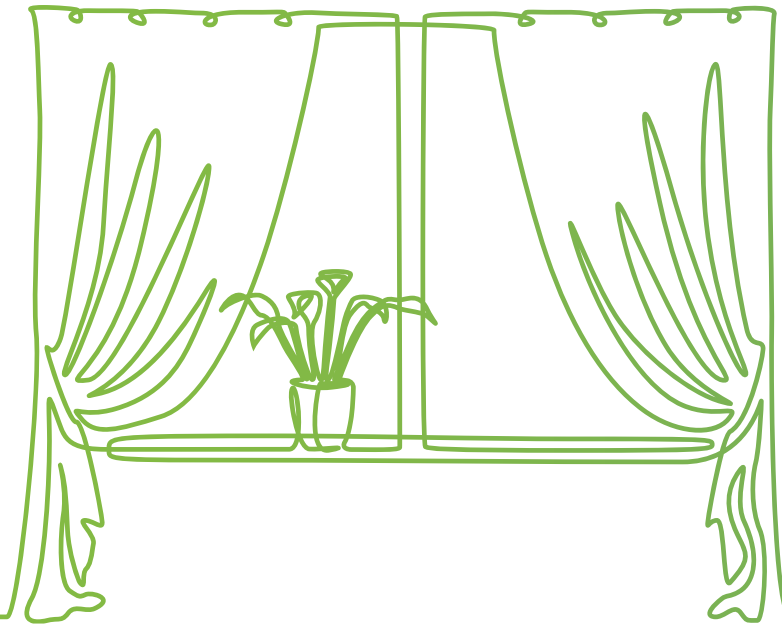
Advanced glazing for safety and efficiency: Laminated and toughened glass are increasingly used for safety and aesthetics, while double-glazed and low-E coated glass solutions are gaining traction for their ability to enhance energy efficiency and indoor comfort.

Smart and automated

solutions: Premium segments drive demand for sensor-based doors, automated sliding systems and smart glass, reflecting a growing appetite for technologically advanced and lifestyle-enhancing products.

Design innovation in façade

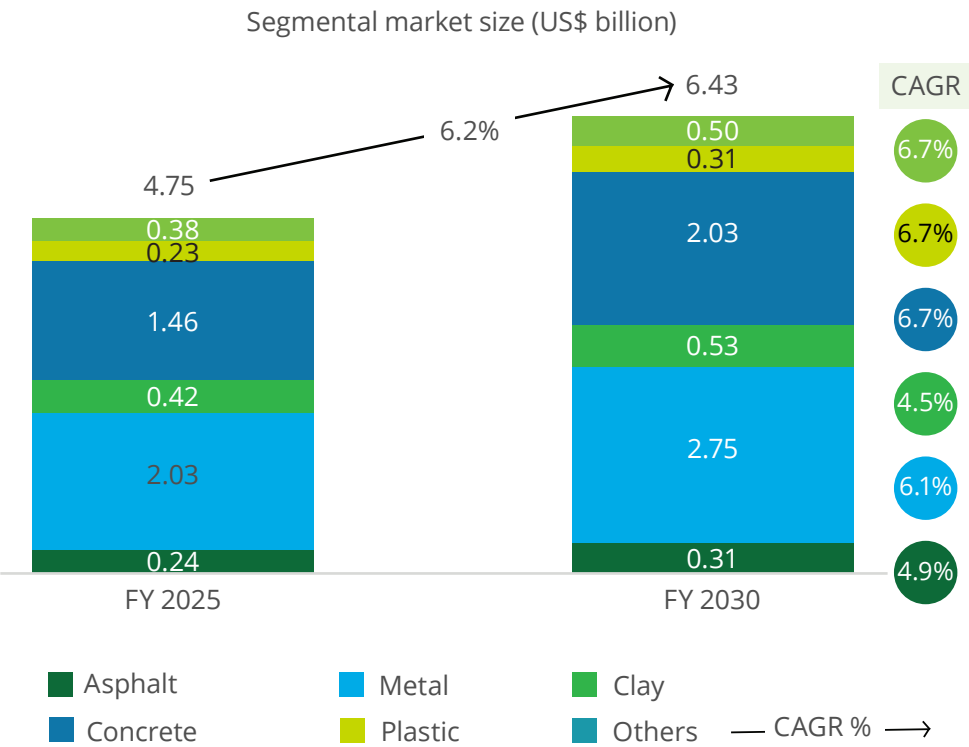
systems: Slimmer profiles, minimalistic aesthetics and customised façade solutions are becoming popular, with architects and developers prioritising products that deliver modern design appeal and performance benefits.



Roofings

Market snapshot

Construction activities in India are booming due to continuous urbanisation, industrialisation, population growth, rising middle-class incomes and infrastructure development. This momentum is further supported by substantial government initiatives, including a significant allocation of US\$130.57 billion in 2021,²⁴ under schemes such as the Pradhan Mantri Awas Yojana, which has delivered over 28 million homes to date. Residential Roofing accounts ~ for 35 percent of the total roofing market in India, reflecting the strong demand in the housing segment.²⁵



Source: EMIS, Deloitte analysis

Consumer trends

Energy efficiency: Consumers increasingly opt for roofing materials that offer better insulation and energy efficiency, reducing long-term energy costs.

Customisations: Growing demand for customised roofing solutions that match aesthetic preferences and architectural styles is driving greater variety in colours, designs and materials.

Pre-fabricated solutions: Trends towards prefabricated and pre-engineered buildings drive demand for modular roofing systems that offer quick installation and cost-effectiveness.

Climate-resilience: Rising demand for roofing solutions designed to endure India's diverse and extreme weather conditions.

Product trends

Solar roofing: Solar roofing integrates photovoltaic cells directly into roofing materials instead of mounting separate solar panels on rooftops.

Cool roofing: Cool roofing systems with reflective coatings and insulation reduce energy use and urban heat island effects.

Sustainable materials: Roofing solutions based on recycled and sustainable materials such as metal, clay tiles and fibre cement sheets for reducing environmental impact.

Polycarbonate-based roofing: Polycarbonate sheets are gaining popularity due to their ease of installation, weather resistance, texture diversity and low upkeep.

²⁴Global & India Roofing Market to 2031, The Insight Partners

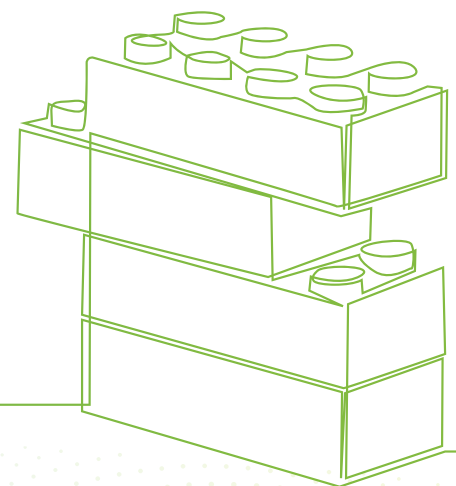
²⁵https://www.emis.com/v2/documents/report/847752824/?keyword=roofing%20market%20india&display_lang=en

Building blocks for brand growth

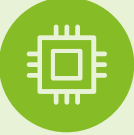

Brands in the home and building sector must sharpen their focus on growth drivers that can shape long-term competitiveness in a rapidly evolving marketplace. To stay ahead, brands must drive **customer value** through product innovation and customer-centric solutions that address evolving lifestyle needs. At the same time, they need to **expand market access and revenue streams** by building omnichannel presence, strengthening distribution networks, enabling channel presence in extended India, and forging strategic partnerships that bring them closer to diverse customer segments. Equally critical is the need to **strengthen ecosystem influence and advocacy** by engaging stakeholders such as architects, painters, carpenters, plumbers and contractors, who play a pivotal role in shaping purchase decisions at the ground level.

Beyond market expansion, brands must enhance **customer experience and trust** to build long-term brand

preference and maximise customer lifetime value. This requires seamless services, transparent engagement and differentiated experiences that foster loyalty. Enhancing customer product knowledge and offering immersive virtual and physical experiences helps build appreciation for value and differentiation. On the operational side, companies must build scalable, agile business models by accelerating go-to-market strategies, improving cost efficiency and adopting future-ready practices that respond to evolving market dynamics. Finally, embedding **sustainability as a core growth lever** will differentiate brands in a competitive environment and resonate with environmentally conscious consumers and regulators alike, positioning them as responsible leaders in the home and building ecosystem. The following table highlights strategic levers and business outcomes, with practical use cases showing how brands can drive differentiation through innovation, smart products, operational efficiency and sustainability.



Strategic lever	Business outcome	Use cases
Technology 	Customer-centric innovation	<ul style="list-style-type: none"> • Colour visualiser enabling customers to digitally preview paint shades, simplifying choices and enhancing purchase confidence • AR/VR visualisation and design simulators empowering consumers to experience and personalise home and household products virtually • Digital design libraries and integration with existing products, enabling seamless customisation, faster design choices and a more informed buying journey
	Experience centres and virtual showrooms	<ul style="list-style-type: none"> • Immersive galleries engaging customers, showcasing products effectively and driving purchase decisions • Virtual showrooms allow customers who can't visit experience centres to explore product ranges and get a realistic sense of look and feel from the comfort of their homes.
	Smart/Connected products	<ul style="list-style-type: none"> • Hands-free hygiene solutions such as sensor faucets, smart bidets and leak detection systems delivering enhanced convenience and healthier living spaces • Smart lighting, app-based locks and IoT devices bringing convenience, security and energy efficiency to modern home and household living

Strategic lever	Business outcome	Use cases
Technology 	Process optimisation	<ul style="list-style-type: none"> • Faster prototyping enabling shorter delivery cycles, quicker market launch and accelerated customer responsiveness • AR/VR to reduce design errors by enabling precise visualisation and real-time validation before production • CAD/ CAM, CNC manufacturing driving scalability and high precision design • AI/ IoT in manufacturing, enabling predictive maintenance and real-time quality control, enhancing efficiency and product reliability
	Personalised design	<ul style="list-style-type: none"> • AI-powered personalisation delivering tailored recommendations • Generative design enabling customisable, functional solutions with unique options, blending creativity and practicality for consumers • Wider tinting machine deployment, digital painter apps streamlining colour selection and enhancing efficiency in paint selection
Distribution and GTM 	Omni-channel	<ul style="list-style-type: none"> • Hybrid model combining physical showrooms with online presence, delivering seamless shopping and expanding market reach

Strategic lever	Business outcome	Use cases
Distribution and GTM 	Tier-2 and tier-3 market expansion	<ul style="list-style-type: none"> • Franchise-led studio and stores unlocking growth in tier-2 and tier-3 markets by expanding reach and local presence
	Smart Intelligence	<ul style="list-style-type: none"> • Automate orders to delivery systems, accelerating fulfilment, reducing errors and enhancing customer satisfaction • Enhance logistic intelligence optimising supply chain, reducing costs and ensuring timely delivery • Predictive analytics for demand planning, enabling accurate forecasts and efficient inventory management
Influencer ecosystem 	Professional network	<ul style="list-style-type: none"> • Loyalty programmes moving from transactional to experiential • Targeted programmes for architects, contractors, plumbers, electricians, masons, etc., driving brand advocacy and influence material selection in projects • Referral programmes boosting influencer acquisition • Incentive schemes motivating collaborators and stakeholders to drive higher sales and enablement
	Digital influencer engagement	<ul style="list-style-type: none"> • Training programme and certifications for influencers to improve technical skills and value selling capabilities, enabling them to upsell premium SKUs, enhancing sales and increasing average transaction value • DIY creators showcasing gadgets and setups, driving digital engagement and inspiring consumer adoption

Strategic lever	Business outcome	Use cases
Customer experience design 	Simplified discovery and support	<ul style="list-style-type: none"> • Voice and chat commerce capturing conversational insights to enhance personalisation and drive sales • Data collection on consumer behaviour and D2C engagements, enabling targeted marketing and informed business decisions
	Customer loyalty platforms	<ul style="list-style-type: none"> • Rewards, cashbacks and exclusive offers strengthening brand affinity and driving customer loyalty • Enhance customer lifetime value and channel collaborator relationship, boosting long-term revenues and business sustainability
	Quick access to information	<ul style="list-style-type: none"> • QR codes for warranty and installation guides simplify access to product information
	End-to-end services	<ul style="list-style-type: none"> • Paint and application services delivering convenience, quality assurance and a seamless customer experience
	Seamless digital journey	<ul style="list-style-type: none"> • Seamless journey from inspiration to design, purchase and installation, enhancing customer engagement and convenience
	Trust drivers	<ul style="list-style-type: none"> • Extended warranties build trust, reduce purchase hesitation and enhance customer confidence

Strategic lever

Business outcome

Use cases

Sustainability



Track eco-footprint

- Technology to track carbon footprint, enabling sustainability monitoring

Energy and water efficiency


- Solar-powered cameras and low-energy sensors offering sustainable, energy-efficient home security solutions
- Eco-conscious choices such as low-flow taps, conserving water and promoting sustainable living
- Solar-integrated roofing combines energy generation with sustainable building solutions
- BLDC fans delivering superior energy efficiency and lower operational costs

Eco-friendly products

- Low VOC paints, recycled/reclaimed wood panels promote healthier living spaces and environmentally sustainable building practices
- Carbon-neutral plants minimise environmental impact and support sustainable manufacturing practices
- Bio-based inputs replacing conventional materials with renewable resources, enhancing sustainability and reducing carbon footprints

Green certification

- Positioning retail outlets as “green destinations”, reinforcing sustainability commitments and attracting environmentally conscious consumers
- Certified products with sustainable building codes ensuring compliance and eco-friendly construction practices

Strategic lever	Business outcome	Use cases
Business operating model 	Focus on premiumisation	<ul style="list-style-type: none"> • Designer collection co-created with consumer preferences, enhancing personalisation and strengthening market relevance
	Innovative operating model	<ul style="list-style-type: none"> • Subscription SaaS models for monitoring and security, providing continuous protection while generating recurring revenue
	Localise and scale under Make in India	<ul style="list-style-type: none"> • Cost and supply chain resilience through domestic value addition, reducing dependency on imports and enhancing operational stability

Closing insights

India's home and household sector is entering a new phase where consumers shift from price-led to value-driven decisions. As urbanisation accelerates and disposable incomes increase, demand for modern, eco-friendly and multifunctional household products is expected to surge, fuelling industry expansion over the following decades. To capitalise on this momentum, players across the value chain, such as manufacturers, channel partners, and technology providers, need to go beyond transactions and focus on building deeper trust, personalisation and sustainable consumer engagement.

- **Brand trust and transparency:** As the market becomes more competitive, authenticity and reliability will be key differentiators. Clear communication, dependable after-sales support and consistent quality will strengthen long-term loyalty.

- **Personalisation and consumer insight:** With rising digital adoption, tailoring offerings to individual preferences is no longer optional. Data-driven insights, curated recommendations and flexible solutions will ensure a stronger consumer connect.

- **Omnichannel presence:** Consumers now expect seamless journeys across discovery, trial and purchase, whether in stores, e-commerce, or quick commerce. Building an integrated presence with agile inventory and logistics will be essential to meet these diverse expectations.

- **Sustainability and adaptability:** Eco-consciousness is increasingly influencing purchase decisions. Brands that embed sustainable practices while remaining flexible to shifting consumer behaviours will be better positioned for long-term success.

- **Enhanced consumer education:** Skilled workforce development to effectively engage with customers will further accelerate industry maturity, ensuring high competitiveness in a rapidly transforming market.

- **Influencer ecosystem:** Architects, designers and digital creators are becoming key opinion leaders in shaping purchase decisions for high involvement categories, whereas plumbers, masons, contractors and electricians often shape decisions for

low involvement categories. A collaborative ecosystem can amplify brand visibility, drive credibility and influence aspirational choices. The future will favour players who combine technology, sustainability and consumer empathy to create value for all stakeholders within the ecosystem.



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Acknowledgements

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