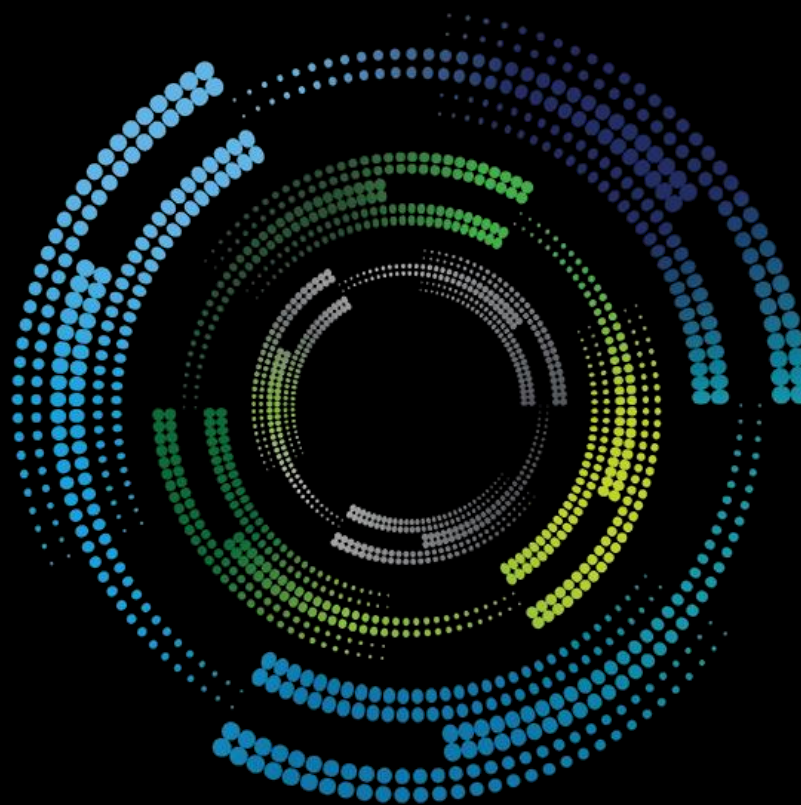




Blue collar workforce trends 2025 – Abridged report

From labour-intensive to tech-enabled: Ushering in a smarter workforce

June 2025

Foreword

The condition of blue-collar workers in India in 2025 is a story of ongoing struggles and slight improvements, deeply affected by critical recent events. **The rise of automation and AI integration** has had a significant impact on blue-collar jobs, especially in the manufacturing and logistics sectors. Many industries, from auto manufacturing to warehousing, are adopting technologies that replace certain manual labour tasks. This shift has created apprehension among workers and unions as automation threatens to reduce traditional roles, while employers look to cut costs and boost productivity.

The labour code reforms have been another major headline affecting blue-collar workers in 2025. While some reforms aim to improve workers' access to social security and benefits, the practical effects are unclear, with discrepancies in enforcement across states. Concerns remain that these reforms may reduce job security for certain workers as companies gain more flexibility in hiring and layoffs. 2025 has been marked by significant pressures on blue-collar workers in India, driven by structural changes, technology shifts and evolving labour policies.

As you review our Blue-Collar Workforce Abridged Report, we invite you to reconsider policies and ideas that may not have been top of mind before the pandemic, and to consider your employees' needs for remuneration, incentives, flexibility, upskilling, and health and safety measures.

The manufacturing industry has rebounded with vigour, and we hope to move towards a brighter future in collaboration with our valued blue-collar workers.

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About the report

Deloitte's Blue Collar Survey provides a detailed analysis of workforce trends across industries and regions, offering insights into employee demographics, compensation and benefits benchmarking, hiring, performance management, diversity and Long-Term Settlement (LTS) strategies.



Number of industries covered **12+**



Number of companies participated **200+**



Number of plants covered **300+**



Pan India study which covered **five** regions

Participating organisation demographics



60%



Manufacturing

- Automobile OEM and automobile components manufacturing
- Metals and mining
- Tyres
- Chemical
- Cement



10%



Services

- Real estate
- Hospitality
- Hospitals
- Retail



20%



Pharma/Life Sciences



10%



FMCG/FMCD

Abridged report - focused summaries vs detailed report - comprehensive analysis 1/2

✓ Abridged report covers vs ✗ detailed report

Blue collar cross-industry trends

- ✓ How leading industries are shaping the future of blue-collar workforce
- ✓ Voice of industry – quotes from industry SMEs
- ✗ The rise of blue-collar and “new collar” - What organisations need to know
- ✗ Typical roles in production and production support at the entry-level cadre
- ✗ Split of workforce as per the general production and support flow
- ✗ Impact of budget and 8th pay commission on gig workers

Compensation trends

- ✓ Emerging careers – trends, salaries and influencing factors
- ✗ Regional variations – a look at minimum wages across states
- ✗ Understanding allowances – prevalent types across industries
- ✗ Typical compensation structure – component-wise break-up understanding
- ✓ Overall compensation medians basis years of experience and region
- ✗ Compensation ranges basis years of experience and region for Non-ITI, ITI & diploma holders

Demographic trends

- ✓ Blue-collar belts covered in the report
- ✓ Educational, experience and age demographics
- ✗ Technical roles and skills prevalent in plants, factories and sites
- ✗ Premium and discount roles in blue collar
- ✗ Blue collar workforce demographics

Performance management and career mobility

- ✓ Promotion and grade overlaps in blue-collar roles
- ✗ Assessment parameters & promotion framework
- ✗ Programs and qualifications for the temporary blue-collar workforce
- ✓ Blue-collar employee lifecycle and career paths

Long-term settlements

- ✓ Scope and coverage
- ✗ Compensation, including disbursement cycles, determination of bonus, etc.
- ✗ Agreement & terms
- ✗ Other details, including lead time, sign-off period, etc.

Benefits

- ✓ The growing focus on blue-collar employee benefits
- ✓ Beyond the basics - other key employee benefits
- ✗ Insurance
- ✗ Housing
- ✗ Night shifts, weekly offs, and retirement
- ✗ Working hours and over-time
- ✗ Leaves & absenteeism - paid-time off

Abridged report - focused summaries vs detailed report - comprehensive analysis 2/2

✓ Abridged report covers vs ✗ detailed report

Hiring schemes and strategy

- ✗ Blue-collar employee hiring/demand trends around the world
- ✓ Areas of demand for blue-collar workers
- ✗ Gen-Z outlook of the blue-collar workforce
- ✓ Hiring trends across industries FY 24–25
- ✗ Key challenges and channels
- ✗ NAPs/NATs/Learn & Earn
- ✗ Stipends for the duration of training

Diversity

- ✓ Across industry diversity in blue blue-collar workforce
- ✗ The role and market presence of women shopfloor workers
- ✗ Blue-collar workforce region-wise diversity

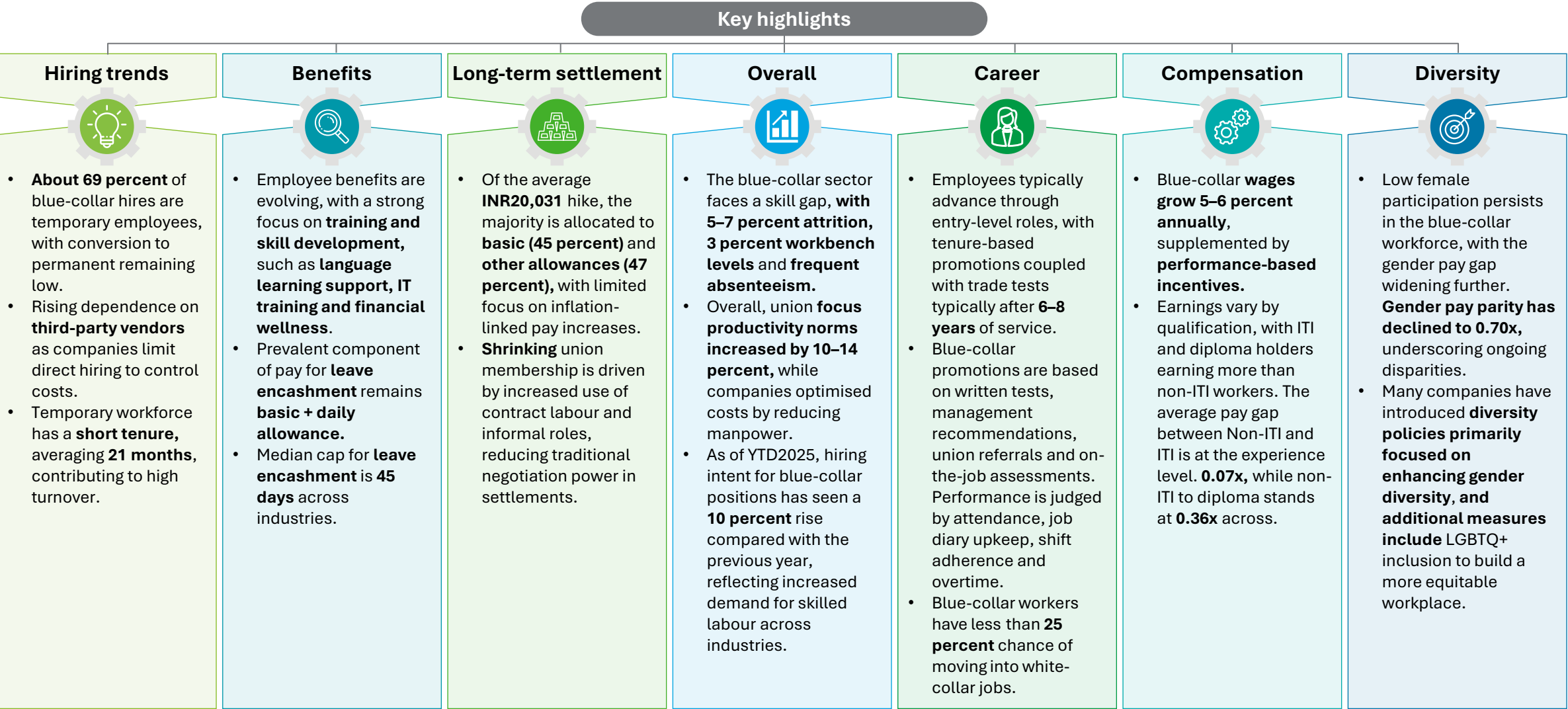
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Executive summary

Blue-collar industry trends – Snapshot



Understanding attrition trends

Employee turnover

Organisations have reported a **5–7 percent** annual attrition of their permanent blue-collar workforce.

Over  **40%** of employed blue-collar workers are actively seeking new opportunities.

Career portals connect workers with potential employers. While these platforms improve labour market efficiency to some extent, they fundamentally fail to address the core issue: **the scarcity of skilled workers**.

Region	Average attrition
North	4.%
South	6.1%
West	5.6%

Cadre	Average attrition
Blue-collar permanent	5.5%
Flexi (Apprentice/ Trainee)	7.1%
Contractual workforce	1.8%

Drivers for attrition

Compensation and benefits

Limited career development options

Job characteristics–employee desire gap

Issues such as personal compulsion, need to relocate

Correlation between retention and other factors

Note that these numbers indicate a positive correlation, the higher the correlation the greater the chances of retention

Rewards and Recognition	0.74
Superior Support	0.68
Working environment	0.67
Career Progression	0.7

Tackling attrition

Healthcare and insurance support

Financial assistance to those who need credit access

Upskill to enable future readiness

Protection of pay

Detailed report also covers: Addressing absenteeism and workforce stability trends

Blue-collar worker persona matrix

Qualification	Diploma		Gen Z (0–6 years YOE)	Zillennials (6–10 years YOE)	Core Millennials (10–20 years YOE)	Gen X (20–25 years YOE)
		Roles	Apprentice → Jr. Engineer	Jr. Engineer → Supervisor	Supervisor → Trainer	Technical Trainer/Advisor
		Compensation and benefits	Overtime + fast-track roles; Green-tech exposure; Flexi shifts	Subsidised family insurance; Tenure bonuses; Company certifications	Children’s higher education support (scholarships); Housing EMI support	Pension top-ups or gratuity enhancements ; Post-retirement benefits
		Wellness and engagement	Digital learning; Structured apprenticeship pipelines	Support for first-time homebuyers; Peer reward programmes	Recognition, training roles; Work-life alignment	Advisor roles; Legacy awards; Reduced shifts, Minimal relocation
		Diversity motivators	Female apprentice hostels	Flexi shifts for women; Inclusive IJP, menstrual health leave; PwD upskilling	Leadership for long-tenure women	Desk roles for PwD; Eldercare for rural communities
	ITI	Roles	Trainee → Operator	Operator → Lead Operator	Lead → Team Leader	Team Leader → Supervisor/Mentor/Process Auditor
		Compensation and benefits	Earn while you learn schemes (dual learning); Tie-ups with OEMs for tech-based trades; Daily wage apps	Fast-tracked promotion criteria; Internal referral bonuses	Tuition reimbursement for kids; Loan support	Retirement health schemes; Medical leave bank + terminal illness support
		Wellness and engagement	Peer mentorship; Access to Modern tools; Safety-first work zones	Child education allowance; Worksite wellness programmes	Group savings and retirement planning tools ; Worksite health checkups + wellness sessions	Light-duty shifts; Role adjustment support; Final career phase planning assistance
		Diversity motivators	Gig-style subcontracting options or side gigs ; Women-only ITI tie-ins	Sensory-friendly safety zones (for PwDs); Supervisor mentoring for women	Emergency loans for single parents; Community support in rural hiring zones	Home-plant postings for PwDs; Eldercare-linked housing
	Non ITI	Roles	Helper → Machine Assistant	Assistant → Junior Operator	Operator → Lead	Lead → Team Leader
		Compensation and benefits	Stable wages + attendance and safety bonuses ; Free transport and basic meals (cost sensitive perks)	Regular increments; PF + marriage/maternity grants	Long-term PF growth; Role-based bonus	Terminal bonus; Retention bonus linked to tenure; Gratuity;
		Wellness and engagement	Supervisor-led mentoring; Plant townhalls, Housing near worksites	Recognition schemes; Grievance redressal support, Affordable canteen, transport facilities	Affordable creche and health cover; Community health drives, Festival, marriage, maternity/paternity grants	Minimal shift changes; Recognition by plant leaders; Light tasks
		Diversity motivators	Women: safety-equipped transport; Rural: local hiring links	PwD: fixed-station job roles; Women: Separate changing rooms	Women: career coaching; PwD: ergonomic workstation access	Desk-based low-mobility roles; Women: phased retirement options

Blue-collar cross-industry trends

Blue-collar cross-industry trends: How leading industries are shaping the future of blue-collar workforce

 Automobile and related industry The Indian automotive sector is experiencing a shift towards automation and robotics to enhance productivity.	Demand drivers The push towards EVs has boosted demand for skilled blue-collar workers in manufacturing and assembly lines. Companies are also emphasizing reskilling to manage the transition from internal combustion engines to EVs.	Hiring trends Increased focus on operational automation is creating a mix of traditional and technologically skilled roles.	Impact on workers Automation Integration of advanced technologies Job displacement Opportunities in operating and maintaining automated systems
 Chemicals The chemical industry is expanding, driven by increased demand in various sectors. This growth necessitates a skilled workforce to manage complex chemical processes.	Growth areas Expansion in speciality chemicals and green chemistry has created a demand for skilled technicians and operational workers.	Workforce dynamics Many firms are offering training programmes to upskill workers to meet stringent environmental and safety compliance needs.	Impact on workers High demand for skilled workers Safety protocols Skilled in machinery Demand for skilled workers in safety function
 FMCG/FMCD The FMCG sector is facing challenges due to economic factors affecting consumer spending. Companies are focusing on efficiency and cost-cutting measures.	Growth areas Growth in e-commerce has driven demand for roles in warehousing, packaging and logistics.	Hiring trends The sector shows robust hiring in Tier 2 and Tier 3 cities due to market expansions and a shift in the supply chain.	Impact on workers There is a potential slowdown in hiring within the FMCG sector. Decline in job opportunities
 Metals and mining The metals and mining industry is adopting advanced technologies to improve efficiency and safety. Despite these advancements, the sector continues to rely heavily on labour.	Challenges Workforce shortages in rural areas have been a concern due to migration trends. However, urban mining hubs continue to employ large numbers of blue-collar workers.	Workforce dynamics Automation in mining is increasing, leading to a demand for technically trained operators and equipment specialists.	Impact on workers Technology Advancements Safety Protocols Upskilling / Training Improved Working Conditions
 Pharmaceuticals The pharmaceutical sector has seen significant growth, especially in the wake of global health challenges. This expansion has led to increased production demands.	Demand drivers Shift towards biotechnology and pharmaceutical R&D has driven the need for technically proficient workers, with firms investing in continuous education and skill development.	Sector resilience The pandemic highlighted the sector's critical role, with steady hiring for production, quality control and logistics roles.	Impact on workers Industry Growth Increase in Inspections from FDA Increase in Jobs Demand for Quality Assurance Roles

Blue-collar cross-industry trends: Quotes from industry SMEs

“

“For companies setting up a plant, it is recommended to hire a temporary workforce through different apprenticeship programmes and slowly absorb them. We have stopped the conversion of any temporary workforce to permanent as we have become overstaffed over the years.”

- Plant HR head of a leading automotive manufacturer in Pune

“

Unionisation is high in Pune. So, while you can delay it through good work practices and hiring more apprentices, when the time comes, it is recommended to always have internal union instead of a politically affiliated one.

- IR/ER head of a leading Automotive Manufacturer in Pune

“

“Quick commerce is fast emerging as the creator for blue-collar jobs, with the sector alone set to create half a million new jobs and lead the way beyond 2025. Quick commerce is about more than convenience; it’s about creating careers, opportunities, and a sustainable workforce.”

- Sales head at an online job platform

“

There’s a rising trend of small businesses engaging in sustainable practices, be it through eco-friendly operations or community outreach programs. This not only aids in brand building but also ensures a symbiotic relationship with the locality. Blue-collar SMEs looking to enhance their community engagement can start by identifying local needs and issues

- VP-HR at a manufacturing firm in Tamil Nadu

“

“Talegaon being at the outskirts of the city, it is recommended to offer competitive pay as compared to the market. While unionisation is rampant, they can hire off-roll through third-party sourcing agencies and hire experienced associates (aged 35 and above) as they have less inclination towards forming an employee union.”

- Professor at TISS & IIM-Mumbai and former ILO employer specialist

“

Have a strong in-house training program; hire from grassroot-levels such as NGOs, charitable trusts; provide a good working environment; and don’t think of unions as your adversaries. A nurtured psychological contract between employer and employee ensures there is no need for a union

- Labour law expert based out of Maharashtra

“

For many blue-collar workers in India, employment isn’t just about earning a living—it’s about dignity, stability, and hope for the future. Unfortunately, the perception of blue-collar jobs as “lesser roles” perpetuates a cycle of neglect. This mindset must change.

- Operations Supervisor at a manufacturing firm in Maharashtra

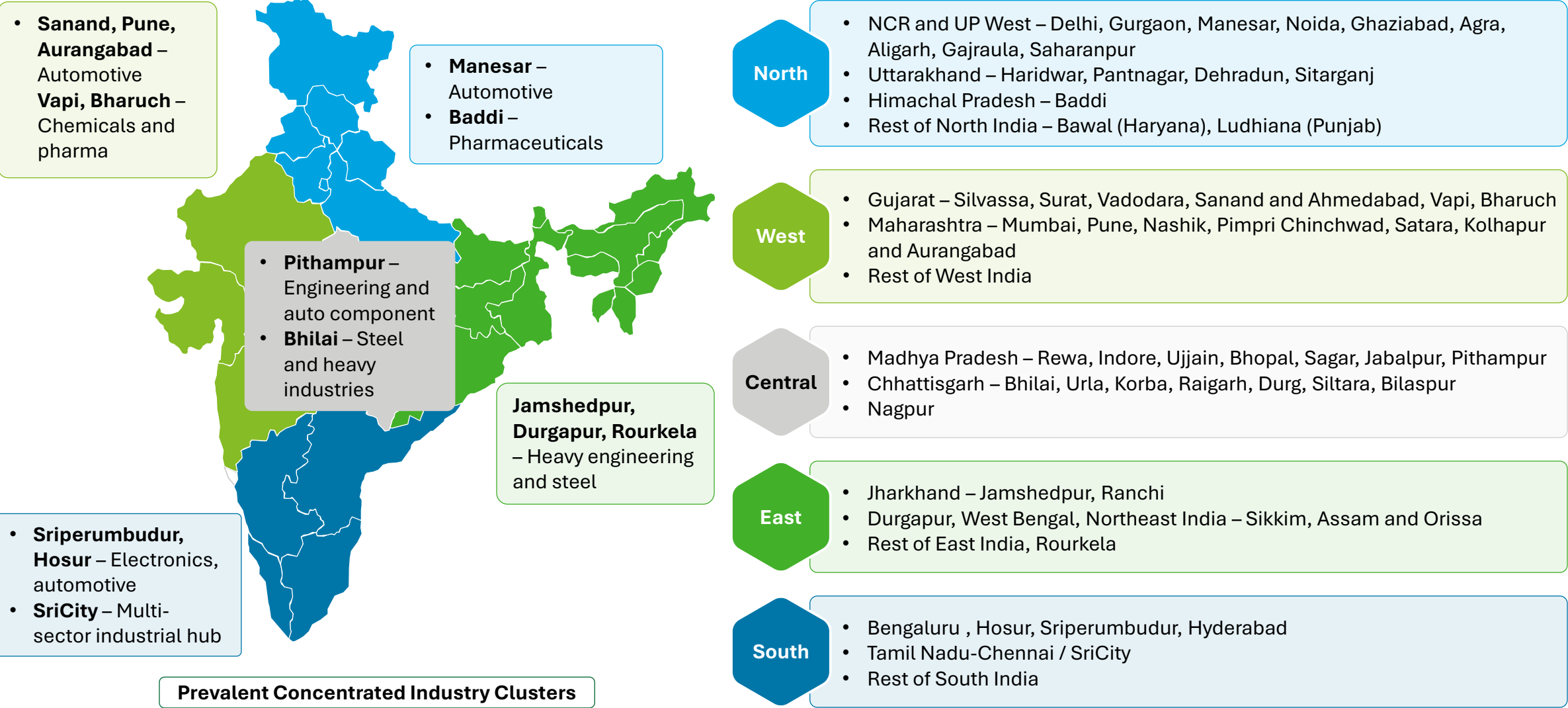
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Often, organisations focus only on the value of developing new leaders and neglect the development of seasoned leaders. A few will take their thinking to the next level and continue to invest in seasoned leaders. Organisations that invest in both new leadership and seasoned leaders will clearly create the most competitive workforce.

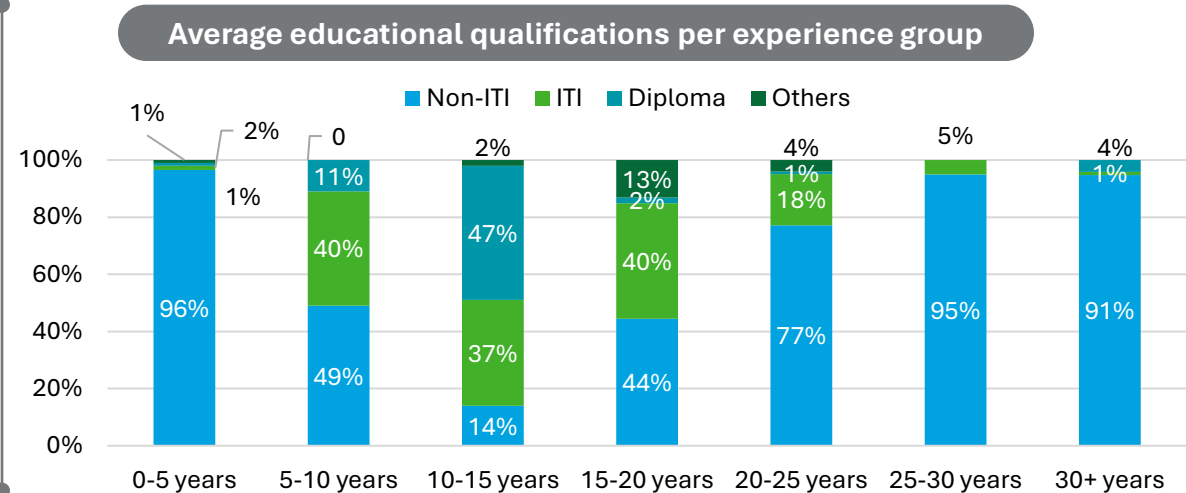
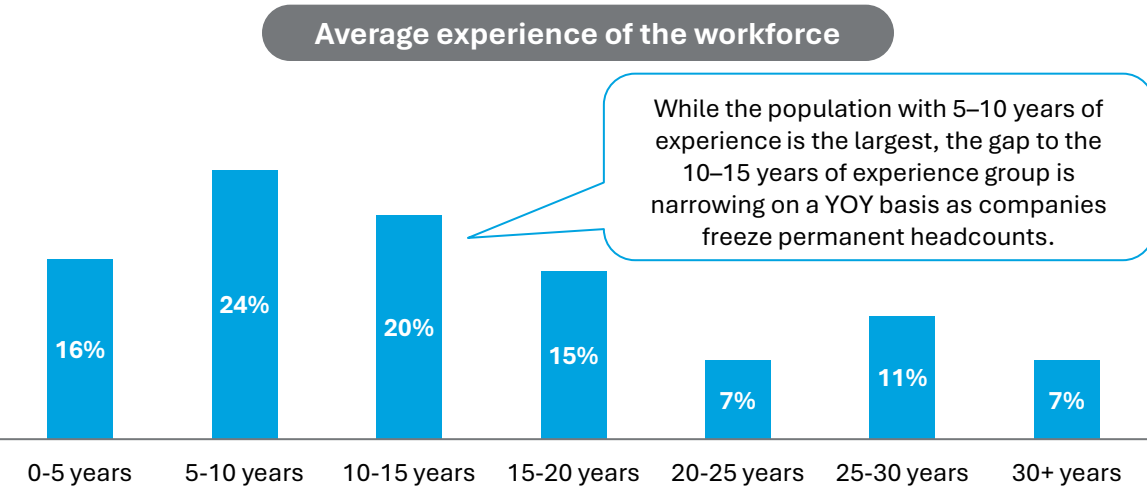
- VP talent at a fast-food chain

Demographic trends

Demographic trends: Blue-collar belts covered in the report



Demographic trends : Educational, experience and age demographics



Age demographics: The majority of the blue-collar workforce falls within the **26–40 years** age group, representing the most active and experienced segment of this labour pool. This age range is considered the prime working years, where employees typically have a balance of physical capability, skill proficiency and work experience. The unionised workforce is generally ageing, with many companies having workers around **40+** years old and with **15–20** years of experience

Shifts in workforce composition: Over the years, there has been a **notable increase in ITI-trained employees**, as industries started prioritising skilled labour for improved efficiency and technical expertise. Recently, the trend has **reversed**, with non-ITI employees once again constituting the majority of new hires. This shift may be influenced by factors such as the availability of skilled labour, hiring preferences and changing industry requirements.

Workforce experience: The experience level within the blue-collar segment is **highest in the 5–10 year range**, indicating that a significant proportion of workers have gained substantial industry exposure and hands-on expertise within this period. This experience level is often associated with increased productivity, proficiency in handling tasks and better adaptability to workplace demands. Companies are shifting towards a younger, less experienced workforce, possibly for cost-effectiveness or workforce renewal.

YoY growth: 1.60%

38.1 years
Average age of unionized workers

YoY growth: 2.84%

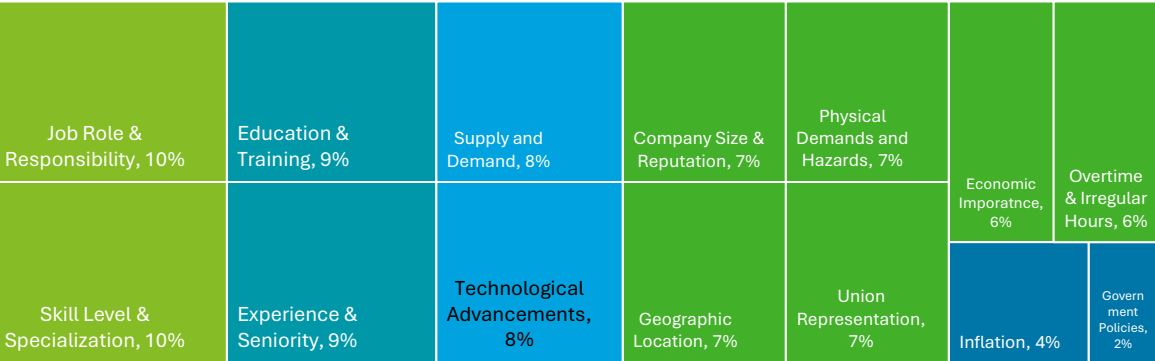
14.5 years
Average years of exp. of unionised workers

Compensation trends

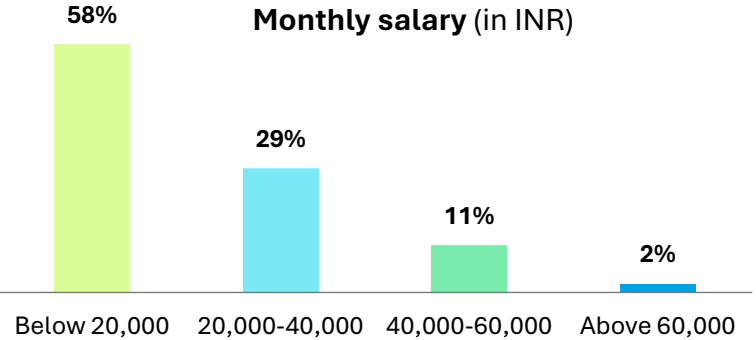
Compensation trends: Exploring emerging careers – Trends, salaries and influencing factors

Percentage impact of various factors on salary premium

The salary premium for blue-collar workers is influenced by multiple factors, each contributing differently to overall compensation. Analysing the given percentages reveals key insights into what drives wage variations in blue-collar roles across industries.



Just **2.3 percent** of blue-collar jobs pay above INR60,000 per month. These roles and their holders are often highly experienced, highly specialised or involve substantial responsibilities, making them accessible to only a select few.

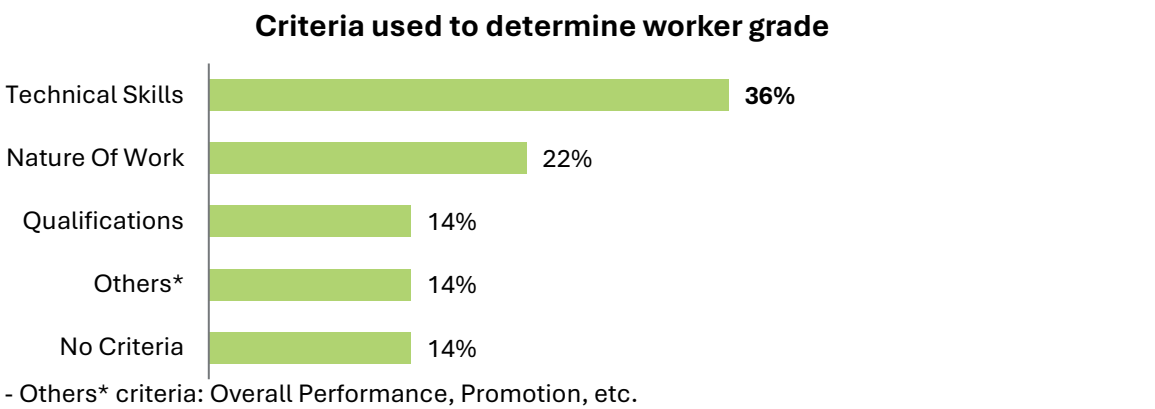


Motivators for job hunt by blue-collar workers

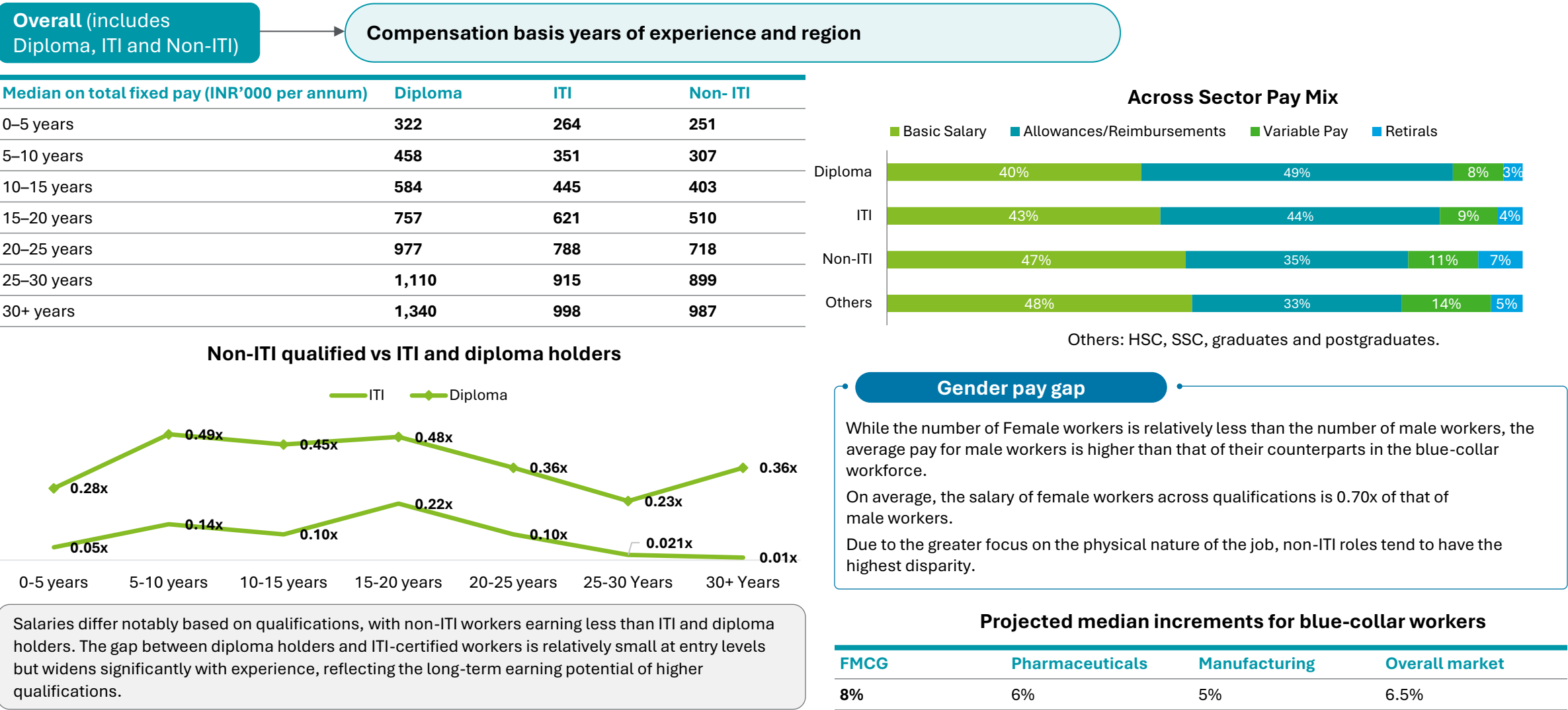
As of YTD2025, hiring intent for blue-collar positions has grown 10 percent compared with the previous year, reflecting increased demand for skilled labour across industries.

Sector-wise salary growth

- Manufacturing and engineering sectors, including automotive, metals and mining, and chemicals, are witnessing steady wage growth of 6 percent, fuelled by investments in industrial automation and production capacity expansion.
- The e-commerce sector is projected to experience the highest salary growth at 7 percent, driven by the expansion of last-mile delivery, warehousing and logistics operations.
- The construction and real estate sector expects a 3.5 percent increase in salaries due to growing urban infrastructure projects and housing developments.
- The healthcare sector is also seeing an 8 percent salary rise, as demand for paramedics, lab technicians and hospital support staff continues to grow.



Deloitte Compensation Stack Up of Anchors Of Pay

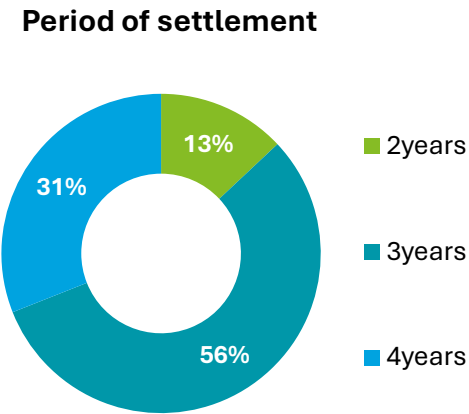


Long-term settlement trends

Long-term settlement: Scope and coverage

Long-term settlement

refers to a collective bargaining process where management and union representatives engage in structured dialogue and negotiations to arrive at a mutually agreed-upon agreement on employment terms.



The average settlement period is **three years**. However, some organisations in the **southern region** follow a **two-year cycle**, while a **4-year** settlement is more commonly seen in **Maharashtra**, particularly in Pune. For the **North and East regions**, this period primarily remains **three years**.

Union membership has been on the decline, influenced by factors such as the rise of contract labour, gig economy roles and informal employment arrangements.

Plants with a prevalent LTS system have at least one officially recognised Union, which in some cases, also extends to 2.

70% Among organisations with unions, ~70 percent of the workforce is unionised.

Around **80 percent** of surveyed organisations have an LTS system, typically implemented in larger plants, while smaller plants often forgo it.

Firms offering LTS restrict this benefit exclusively to their permanent employees.



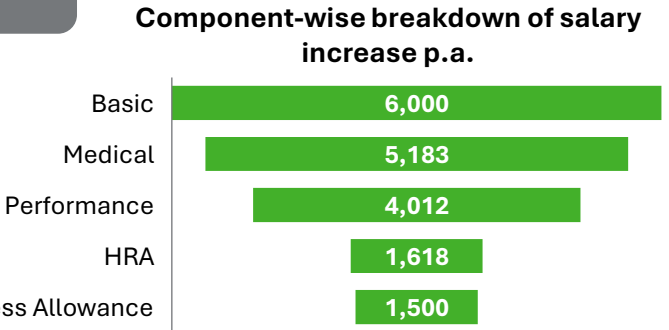
Out of these, 93.75 percent of firms experience an increase in the CTC following LTS.

Among these, 43.75 percent of organisations do not differentiate salary increments, while the rest base increases on employee.

Criteria for increment distribution

Grade	Tenure and grade	Linked to salary	Performance
The salary structure in many organisations consists of key components, including fixed basic, dearness allowance, house rent allowance, retirals (provident fund and gratuity), performance-linked incentives, and bonuses. The increase in salary as a result of LTI is as follows:		The distribution of this increase is analysed as follows, highlighting how each component plays a role in the overall adjustment without altering their sequence:	

Bonus	Bonus amount (in INR)
Minimum	13,360
Average	20,031
Maximum	26,500



Performance management and career mobility

Performance management and career mobility: Promotion and grade overlaps in blue-collar roles

Skilled workers tend to experience more upward mobility than those in other categories.

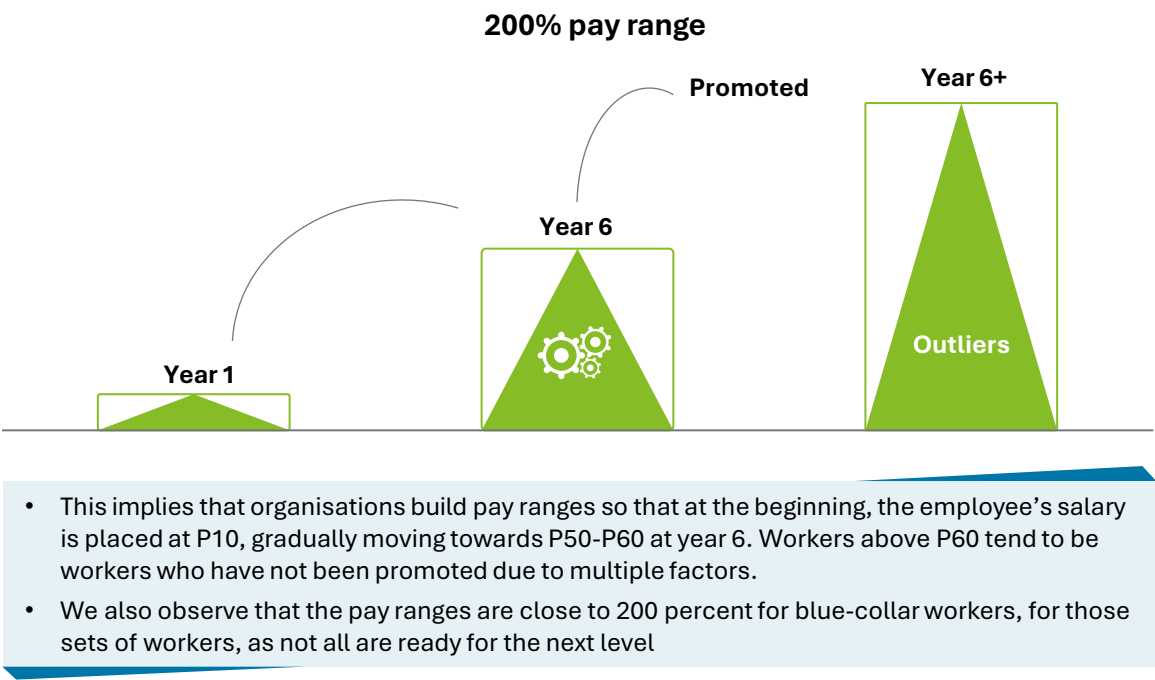
The identification with blue-collar values combined with economic difficulties and reduced opportunity impairs the mobility of most blue-collar workers.

Blue-collar workers have less than a **25%** chance of moving into white-collar jobs.

Although wages for blue-collar workers generally rise by **5–6 percent per annum**, emerging workplace practices provide some relief through increased **performance-based pay**.

The average number of grades in a company for blue collar = **8–10**

35–40 yrs. tenure span	=	Avg years in a grade to be promoted to the next level
Average no. of grades		Promotion cycle followed for the blue-collar employee



Grade/Job overlaps

Job role flexibility

In some cases, employees may perform tasks across multiple roles within their grade, based on production demands.

For instance, a machine operator may be expected to step in as a supervisor or lead worker when the need arises, making job titles and grade boundaries less rigid.

Skill overlap across grades

Technicians and operators at different grades may share similar technical skills, such as machine operation or maintenance, but be differentiated by years of experience or level of responsibility.

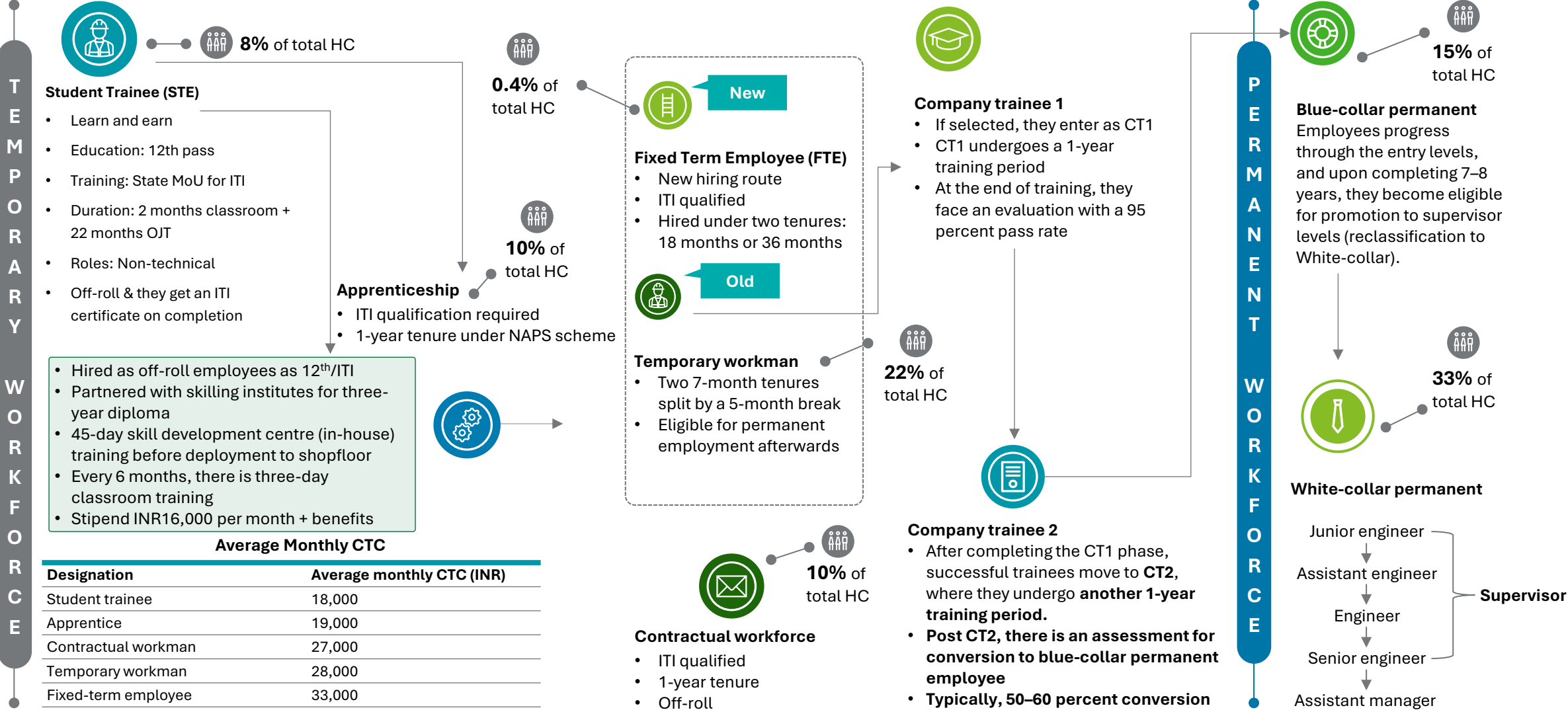
In some cases, employees may hold similar responsibilities but receive different pay or recognition due to grade differences.

Skill growth and career progression

Grade overlaps often create opportunities for employees to "stretch" into higher-grade responsibilities without immediately changing roles.

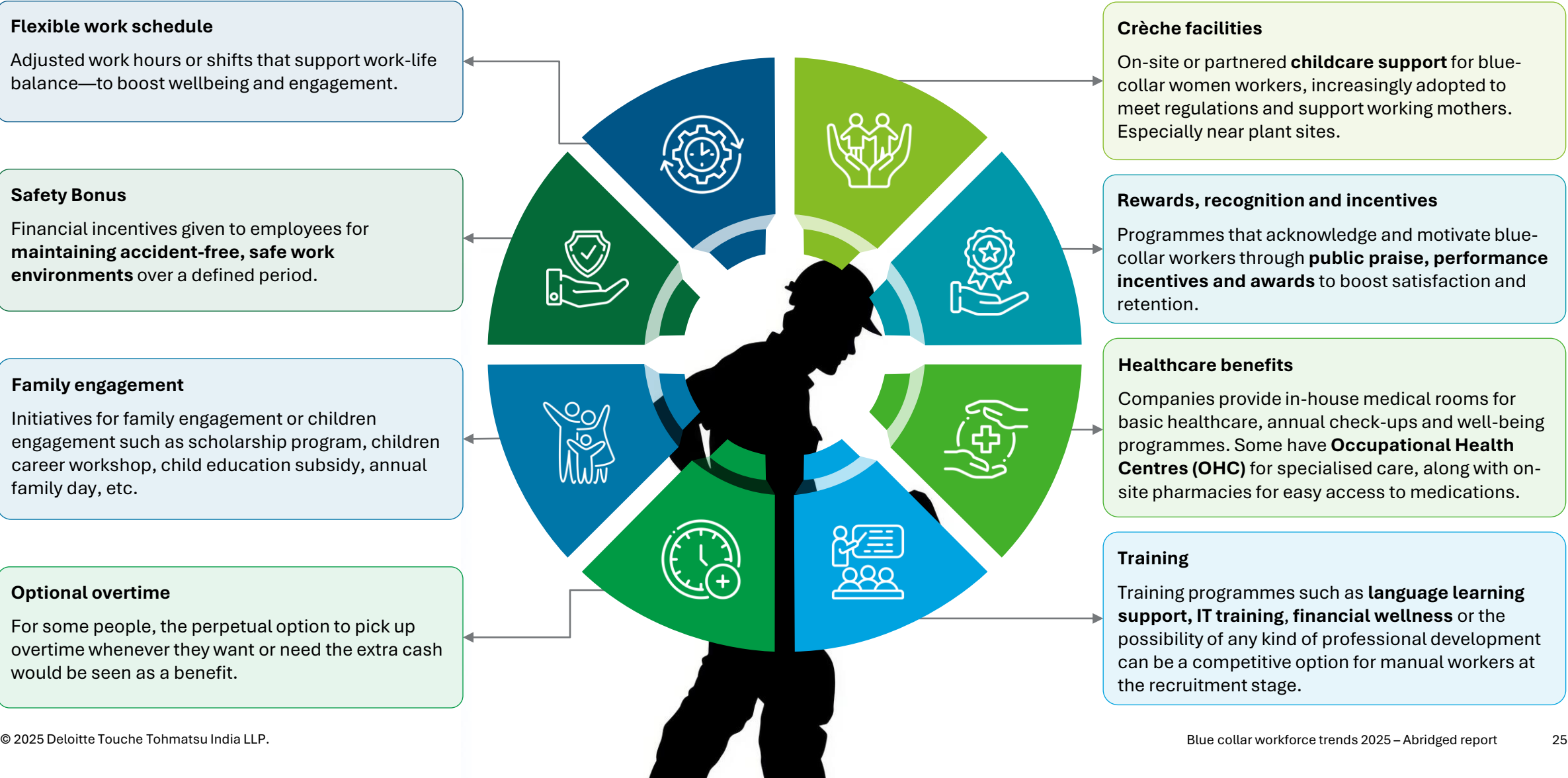
For instance, employees in mid-level roles—such as experienced machine operators or maintenance technicians—might take on leadership responsibilities such as overseeing a small team or managing specific aspects of production. This approach helps companies develop workers with a broader skill set, making them more versatile and ready for upward mobility when the opportunity arises.

Career mobility: Blue-collar employee lifecycle and career paths (Workforce model of large manufacturers)



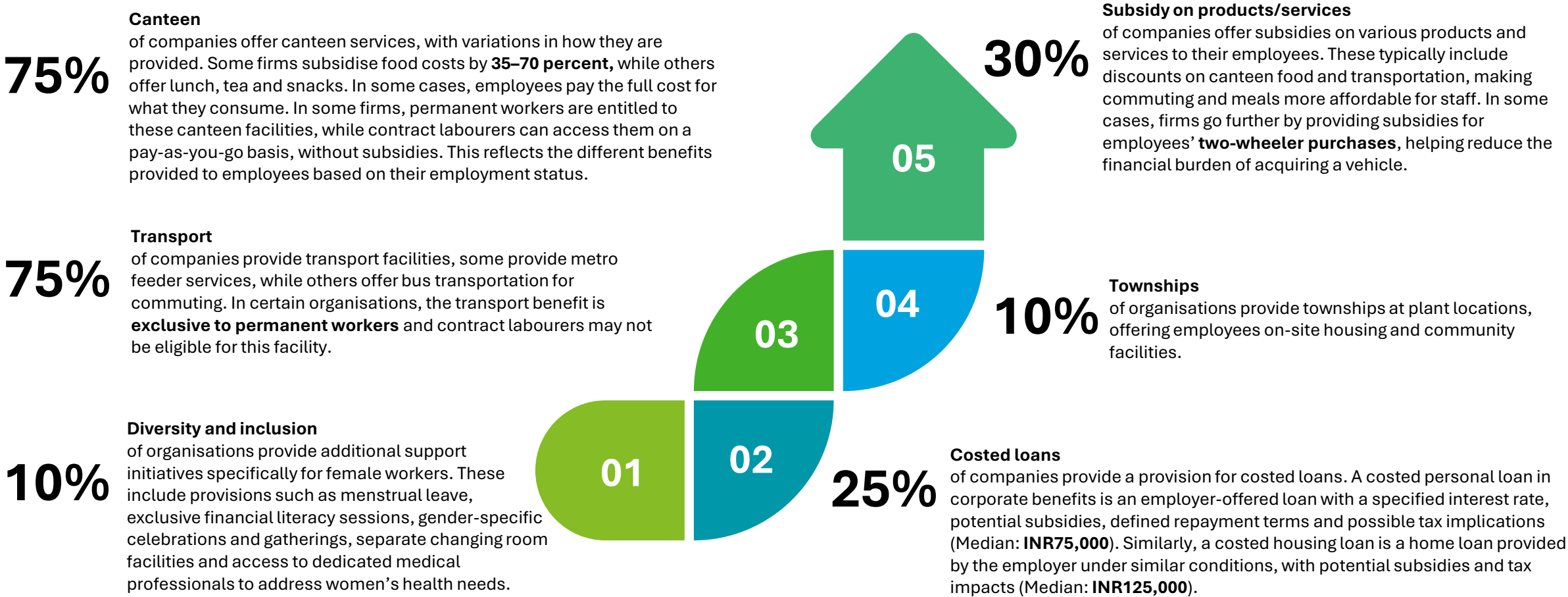
Benefits

Benefits: The growing focus on blue-collar employee benefits



Benefits: Other key employee benefits

Firms provide a wide range of benefits to support employee well-being and job satisfaction. These include medical facilities, transportation, canteen subsidies, insurance plans and additional perks such as uniforms and creche services, ensuring a holistic approach to employee care.



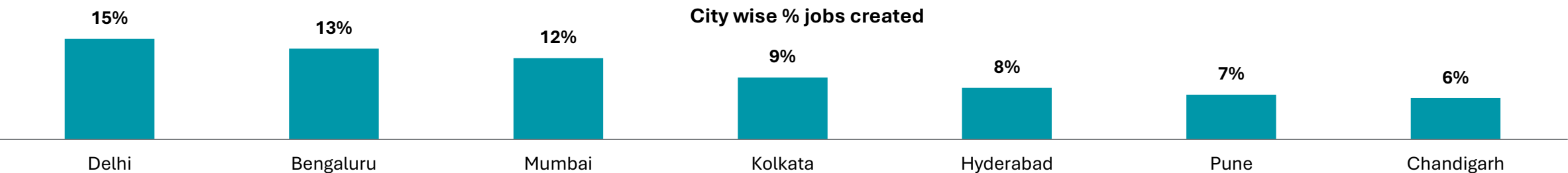
Hiring schemes and strategy

Hiring schemes and strategy: Areas of demand for blue-collar workers

Global companies are increasingly adopting a **“China+1” strategy**, diversifying their manufacturing bases beyond China. India, with its large workforce and improving business environment, has emerged as a preferred alternative. This shift has led to a surge in manufacturing jobs as more companies set up or expand their operations in India.

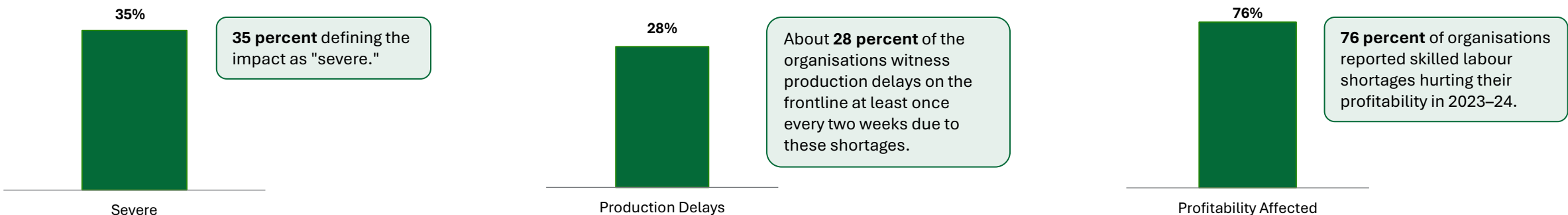
But there is also a new player in town – **electronics manufacturing**. This sector is set to explode, with projections indicating a 5–6 million increase in jobs by 2026. It is likely due to India's push to become a global electronics manufacturing hub, coupled with government initiatives and the growing demand for electronic (and more in general, manufactured) goods both domestically and internationally.

The projected growth for blue-collar workers is as follows:



Skill gap

Studies on construction companies recently revealed that they face a staggering deficit of 25,000–30,000 blue-collar workers across the group. The situation is so dire that real estate and construction companies are expected to increase their gig workforce by 11.5 percent compared with 8.5 percent in the manufacturing industry.



Source: <https://www.foundamental.com/perspectives/indias-blue-collar-workers-paradox-pt-1-and-is-it-a-business-opportunity>

Hiring schemes and strategy: Hiring trends across industries FY 24–25

Key Workforce Trends in Various Private Sector Industries			
Manufacturing/ FMCG	Major demand for skilled workers in the private automotive, electronics and FMCG sectors.	Private companies investing in lean manufacturing and Industry 4.0 technologies, requiring upskilled workers.	High focus on productivity and efficiency improvement.
Pharmaceuticals	Expansion by private pharma giants creating jobs in manufacturing, packaging and quality control.	Demand for compliance-trained workers to meet global export standards.	-
Real estate	Private real estate firms driving workforce requirements in masonry, carpentry and HVAC.	Luxury housing and commercial projects boosting hiring in specialised roles.	Focus on safety certifications by leading private firms.
Logistics and real estate	Private logistics players (e.g., <Logistics Company>, <Courier and Express Logistics Company>) expanding operations	High demand for delivery personnel, warehouse staff and drivers in e-commerce companies such as <Diversified Technology Company #2> and <E-commerce Company>.	Increasing use of gig workers for flexibility.
Retail	Private organised retail brands (e.g., <Retail Company>, <Retail Corporation>) expanding stores, creating roles for store associates, cashiers and inventory managers.	Training programmes for enhanced customer service and tech adoption (e.g., PoS systems).	-
Hospitality	Hiring by private hotel chains (e.g., <Hospitality Company>, <Hospitality Service Provider #9>) for housekeeping, kitchen and F&B roles.	Event management companies increasing demand for short-term skilled roles.	Focus on hygiene and service quality training.
Energy	Private renewable energy firms (e.g., <Renewable Energy Company #11>, <Renewable Energy Company>) <Company Specific Information>.	Demand for semi-skilled workers trained in grid management and energy systems.	-
Textile	Private textile and apparel manufacturers investing in automation and creating jobs for machine operators and inspectors.	Export-oriented companies driving demand for skilled tailors and production supervisors.	-
IT	Private electronics manufacturers (e.g., <Consumer Products Manufacturer #73>, <Computer and Network Security Company>) boosting assembly line jobs due to PLI schemes.	Growth in roles for testing and packaging due to increased private investments.	-
Agriculture	Large food processing firms (e.g., <Consumer Products Manufacturer #5>, <Food Company>) creating jobs in quality control and packaging.	Private cold chain logistics companies driving hiring in storage and transport roles.	-
Metals and mining	Private players in mining and metals (e.g., <Metal Mining Company #31 Sub #1>, <Diversified Conglomerate Holding Company #3 Sub #4>) increasing demand for heavy equipment operators and drillers.	Safety-focused hiring practices in hazardous roles by top private firms.	-

- **Skill development focus:** Private firms are investing in vocational training and certifications for blue-collar workers to meet operational efficiency needs.
- **Urban and Tier-2 city expansion:** Private companies are shifting operations and retail expansions to tier-2 and tier-3 cities, driving localised hiring.
- **Gig workforce dependence:** Growing reliance on gig workers in logistics, e-commerce and retail for cost-efficiency.
- **Worker well-being initiatives:** Leading private firms are enhancing benefits such as health insurance, performance-linked incentives and workplace safety measures.
- **Technology adoption:** Automation in private manufacturing and logistics creating demand for hybrid technical skills.

Diversity

Diversity: Across industry diversity in blue-collar workforce



Across industry

The Indian industrial landscape is experiencing a transformation, with increasing efforts to recruit and retain women in blue-collar roles. Organisations across **manufacturing sectors** are prioritising diversity and inclusion by actively hiring and upskilling women. These initiatives empower women, enhance economic growth and contribute to broader societal progress. Despite these advancements, legacy infrastructure in many industries still limits the representation of women in permanent blue-collar roles. However, **flexible and temporary employment models** have helped integrate more women into factory and shopfloor roles. The inclusion of women in such positions provides **economic independence, improved living standards and positive social impact**, while also **boosting efficiency, quality and innovation in production processes**.

Industry benchmarks (Public sources)

- **Automotive & engineering industry (8–10%)**
- **Chemical & petrochemical industry (<4%)**

Energy and resources company: Actively recruits women in **polymer and chemical production, refinery operations and lab testing roles**.

Chemicals manufacturer: Employs women in **chemical processing, quality control and R&D labs**, with a strong focus on gender diversity.

Chemicals manufacturer: Runs multiple programmes to train and employ women in **chemical production, safety monitoring and technical support**.

Adhesives manufacturing company: Hires women in **adhesive, production, packaging, and logistics roles**.

- **Textile & garment industry (9–10%)**
- **Metals & mining industry (2–3%)**

Energy and resources company: Has increased the hiring of women in **steel manufacturing, quality testing and lab roles**.

- **Electronics & consumer goods industry (8–10%)**

Electronic components manufacturer and consumer products manufacturer:

Employ women in large numbers across **assembly, testing and quality control**.

- **Retail & e-commerce industry (4–5%)**

Retail company: Have increased hiring of women in **store operations, inventory management and logistics roles**.

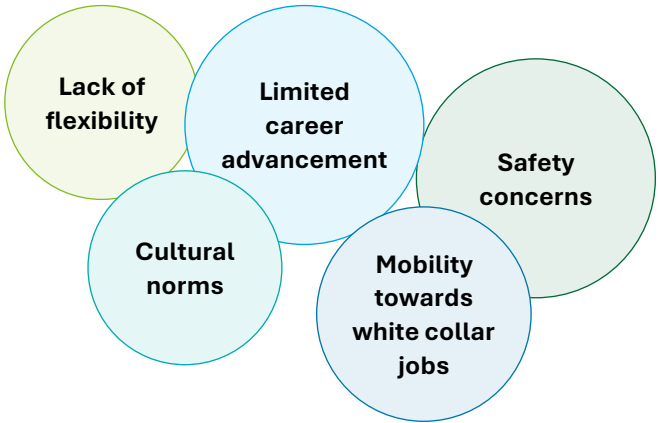
- **Pharmaceutical & healthcare industry (11–12%)**

Pharmaceutical company: Actively hires women in **production and quality control roles**, with structured career growth opportunities.

Pharmaceutical preparation manufacturer: Has introduced women-led teams in **manufacturing and quality assurance** at several facilities.

Pharmaceutical preparation manufacturer: Employs women in **sterile manufacturing, lab analysis and packaging**.

Top reasons cited for lack of women workforce



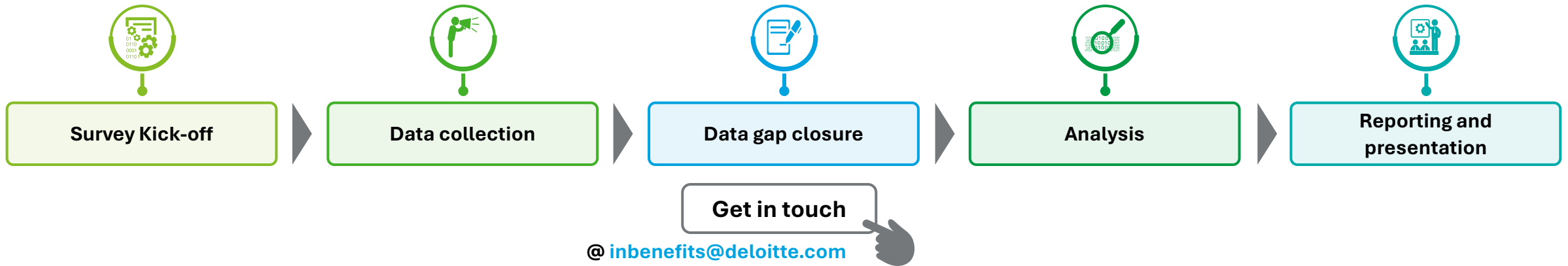
Note : The figures in brackets represent the diversity percentages within the respective industries.

- **Tyre manufacturing industry (5–7%)**

- **Tyre manufacturing company:** Has initiated **women-led teams in quality control and manufacturing units**.
- **Tyre company:** Runs a diversity program that recruits and trains women in **rubber processing, testing and warehouse operations**.
- **Tyre manufacturer:** Employs women in **production, maintenance and supply chain roles** at its plants.
- **Tyre manufacturer:** Hires women in **tyre manufacturing, packaging, and material handling roles**.

Approach, methodology and how to get in touch

As part of the survey, we collected **Plant-wise LTS, compensation, hiring trends, productivity, diversity and select benefits details.**



Our latest insights publication — **Deloitte India Blue Collar Workforce Trends 2025** — is now available!

Our study garnered participation from **200+** organisations and **300+** plants across **four** Industries, **12+** sub-industries and Pan India, covering all **five** regions. It provides a holistic and data-rich view of the evolving blue-collar talent landscape across the country.

In today's competitive environment, where attracting, engaging and retaining skilled workforce is more challenging than ever, this report is designed to **equip business and HR leaders with actionable insights** to make informed decisions that drive productivity, satisfaction and retention.

We are committed to helping you decode the complexities of the blue-collar ecosystem through **crisp, relevant, and actionable intelligence**.

If you'd like to know more or access the full report, please contact us at **inbenefits@deloitte.com**.

We look forward to collaborating with you and supporting your workforce transformation journey.

Thank you,

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