

AdSpends ➞ Sales

NAYI INDIA PLAYBOOK 2026

‘INDIA IS AN AND MARKET’



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Nayi India playbook
Building Live. 3 Weeks To 15th August



Nayi India. The AND Market

India is family-heavy, culturally layered, fast-rising, and mobile-first. It is not one story. It is many stories moving at once.

India is many markets moving at once. Fast.

Mass and premium. Kirana and quick commerce. Metro and tier two. Mobile and physical. Hindi and Tamil and Bengali. All at once. All the time.



\$1.5T → \$6T

consumer spending growth projected by 2030

— WEF + Bain



140 million

new middle-class households by 2030

— WEF + Bain



1 in 2

households will be high or upper-middle income by 2030, up from 1 in 4 today

— WEF + Bain



The AND Market does not stand still. Every number is moving.

Family-Heavy. Multi-Generational.



60.3%

of Indian households were couples with children in 2024

— Euromonitor

Source: Euromonitor International, Household Structure Data, 2024; sociology.institute, 2026

The Festive buyer is not one person. She is a **household system.**



Three types coexist and all drive Festive buying:



Nuclear households with dependent children



Households with adult children above 18 still at home.



Joint and extended families — multi-generational



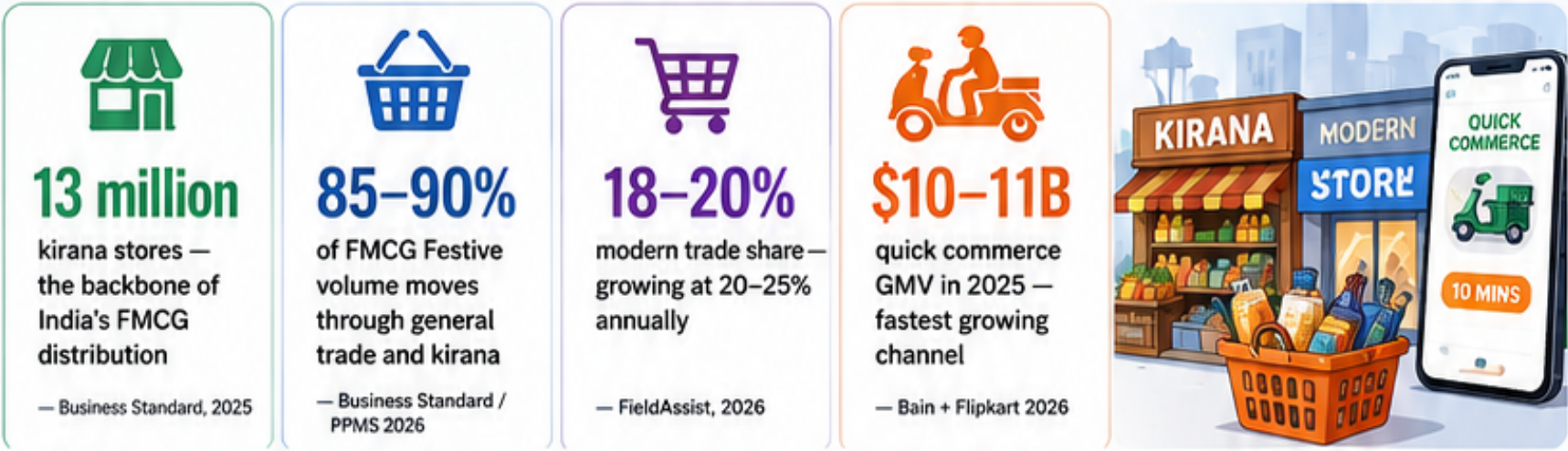
Five Generations **Buying Simultaneously** - Each with Own channel, occasion, brand Relationship

THE FESTIVE 2026 STACK FOR CPG BRANDS

SYNTHESIS & VISUALISATION BY **Mathe+Media**
with SHRIDIP KULKARNI

Nayi India. The AND Market

Kirana. General Trade. Modern Trade. eComm/QComm. All Matter.



General trade and the kirana are the Festive channel. Modern trade owns the premium gifting occasion. Quick commerce owns last-minute

Mobile Digital.
One Layer.
Everywhere.



1.12 billion

cellular mobile connections active in India in early 2025

— DataReportal 2025

750 million+

mobile internet users — 83% of all internet users on mobile

— DataReportal / muftinternet 2025

20 GB

average mobile data consumption per user per month — world's largest

— muftinternet 2025

In India, digital IS mobile. Mobile IS digital. Every Festive touchpoint must be built for mobile first.

Source: DataReportal, Digital 2025: India; muftinternet.com, 2025

Signals. Signals. Signals.



Consumer leaves a long trail. Brand that tracks ALL signals with a comprehensive architecture wins the Festive

THE FESTIVE 2026 STACK FOR CPG BRANDS

YOUR MOVES

01

PLAN FOR A MARKET IN MOTION



DON'T PLAN FOR YESTERDAY'S DATA.
PLAN FOR TOMORROW'S SIGNALS.

July Signals → October Success



Mobile Growth



Kirana Digitising



Quick Commerce Expanding



Rural India Rising

02

MOBILE IS THE FESTIVE SPINE



IF IT DOESN'T WORK ON MOBILE,
IT DOESN'T WORK IN INDIA.



Discovery



Comparison



Purchase



Reorder

750M

Mobile Internet Users



20 GB

Data per User / Month

03

WIN ALL THREE CHANNELS



KIRANA & GENERAL TRADE

85–90%
FMCG Volume



MODERN TRADE

Premium Gifting



QUICK COMMERCE

Last-Minute Urban Impulse

DON'T CHOOSE ONE. WIN ALL THREE.

04

DESIGN FOR THE HOUSEHOLD SYSTEM



Brand Loyalty



Basket Builder



Big Purchases



Quick Commerce



Social Influence

One Household. Five Decision Makers.

05

READ THE SIGNALS NOW

