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From Craftsmanship to Convenience: A shift from Handmade to Modular Furniture in the Residential sector

ABSTRACT

The Indian residential furniture sector is undergoing a transformative shift from traditional handmade furniture to modular systems, driven by rapid urbanization, evolving consumer preferences, and technological advancements in design and production. This study investigates the extent and impact of this transition in Pune, a Tier-2 city that has both traditional and contemporary lifestyles. Utilizing a mixed-methods approach, data triangulation method was used from surveys (157 respondents), interviews with stakeholders—including artisans, architects, interior designers, and furniture manufacturers—and a market review in literature. Findings reveal younger, urban consumers favor modular furniture for its affordability, quick assembly, and space efficiency, while older and high-income users continue to value the craftsmanship and durability of handmade products. Despite modular furniture's dominance in kitchens and wardrobes, challenges persist around durability and limited personalization. Whereas, handmade furniture faces barriers of cost, production time, and limited accessibility to artisan workforce. Thematic analysis strongly stresses on the emotional value and cultural significance of handmade furniture, in comparison with the utilitarian appeal of modular furniture. The most important excerpt is that, both consumer and industry respondents incline and propose a need for a hybrid model that integrates the artistic value of traditional methods with the efficiency and scalability of modular design. This study contributes to design by highlighting the potential of such hybrid systems to integrate sustainability, customization, and urban living needs in India's rapidly modernizing interiors market.

Keywords - Modular Furniture, Handmade Furniture, Consumer Preferences, Urbanization, Hybrid Design Systems, Pune Furniture Market.

1. Introduction

The furniture industry, both globally and in India, is experiencing a fundamental transformation shaped by urbanization, evolving consumer lifestyles, and increasing technological integration in design and production processes (Sharma & Gupta, 2022; Allied Market Research, 2022). A key trend within this transformation is the shift from traditional, handcrafted furniture—created by skilled artisans using natural materials and culturally embedded techniques—to modular furniture systems that offer efficiency, scalability, and a degree of mass customization (Amin & Kumar, 2022).

This shift is primarily influenced by the evolving needs of contemporary city life. Modular furniture, usually made up of prefab, flat-pack parts, is particularly attractive to younger groups like nuclear families and professionals who value cost-effectiveness, ease of transport, and quick assembly, especially in small urban spaces (Li, 2022; Rao & Sen, 2023). The impact of worldwide design trends and the growth of online shopping have sped up this transition, with companies like IKEA making modular furniture more accessible in Indian cities (Market Research Future, 2023; Global Market Research, 2023). Conversely, handmade furniture is still cherished for its longevity, customization options, and craftsmanship—attributes that particularly appeal to older consumers and those with greater disposable income (Patel, 2022; Kumar & Reddy, 2021). Nevertheless, it confronts considerable hurdles in the current market, such as extended production timelines, elevated costs, and a decreasing number of skilled artisans (Traffic India & GFTN India, n.d.; Kumari, 2019). As consumer needs change, the conflict between the lasting nature and heritage of handmade items and the adaptability and cost-effectiveness of modular options becomes increasingly evident. Pune, a swiftly urbanizing Tier-2 city, offers an intriguing setting for this research because of its varied population of professionals, students, entrepreneurs, and traditional artisans. This blend of demographics makes it an excellent small-scale representation to analyze shifting furniture consumption behaviors and the changing relationships between traditional and contemporary design approaches (Aggarwal et al., n.d.; Dahiya, n.d.).

The primary objectives of this research are:

- To assess the impact of the transition from handmade to modular furniture on key industry stakeholders, including consumers, manufacturers, and interior designers.
- To evaluate whether modular systems are likely to dominate the future of residential furnishing or if a hybrid model—integrating artisanal techniques with modular frameworks—offers a more sustainable and culturally relevant solution.

Adopting a mixed-methods approach, this study triangulates insights from structured surveys, stakeholder interviews, and a comprehensive literature review to build a nuanced understanding of the shift in consumer preferences and production practices. Through this analysis, we aim to highlight the challenges and opportunities arising from this transformation and offer design and policy recommendations relevant to India's rapidly modernizing furniture sector.

Limitations: This research was conducted in the Pune region only. A future study can include more cities and regions and a larger sample to study.

2. Literature Review

2.1 Urbanization and the Furniture Industry, Global and Indian Market: Trends, Transformations, and Market Dynamics

The literature review emphasizes that Urbanization in India has been on a steady rise, with the urban population increasing from 34.03% in 2018 to 35.87% in 2022. The shift in demographics has notably affected consumer preferences, especially within the furniture sector. An increasing number of young professionals and smaller families are on the lookout for modern, space-saving, and aesthetically pleasing furniture options (Dahiya). The rising demand for multifunctional furniture, which addresses the limitations of urban living spaces while also being visually appealing, has played a role in boosting the modular furniture market. This sector of modular furniture is characterized by its dynamic nature and focus on flexibility, adaptability, and customization to meet a variety of consumer demands. The

market can be categorized into two primary segments: residential and commercial. The residential sector has experienced a rise in demand for space-saving items such as sofa beds, extendable dining tables, and modular shelving, which aligns with the growth of compact urban living spaces (Global Market Research). Furthermore, the global smart furniture market has seen impressive expansion, fueled by consumer preference for innovative home solutions that boost efficiency. According to a report from Allied Market Research, the market was valued at \$2.6 billion in 2022 and is expected to grow to \$4.2 billion by 2027, reflecting a compound annual growth rate (CAGR) of 10.3% from 2023 to 2027. This growth can be attributed to the increasing adoption of technologically advanced furniture designed to elevate functionality and convenience (Global Market Research). Likewise, the Indian furniture market has shown a strong growth trend, with an estimated worth of USD 23.12 billion. Projections suggest a forecasted CAGR of around 10.5% to 11% from 2024 to 2032. This growth is attributed to rising consumer demand across multiple segments, including high-end luxury residential properties, commercial spaces, retail establishments, and healthcare facilities. As urbanization continues to reshape consumer lifestyles, the demand for modular and smart furniture solutions is expected to grow, further driving market expansion. (Dahiya). The global and Indian residential furniture markets are experiencing significant transformation, with modular furniture gaining widespread traction due to urbanization, shrinking living spaces, and the rise of e-commerce, while handmade/custom furniture is expanding rapidly on the strength of personalization, sustainability, and rising disposable incomes. Globally, the modular furniture market is expected to grow at a CAGR of 4.7% to reach USD 130.6 billion by 2034, whereas the custom furniture market, growing at a faster CAGR of 9.2%, is projected to hit USD 65.67 billion by 2032. In India, modular furniture is forecasted to reach USD 7.53 billion by 2033 (CAGR 7.54%), driven by real estate growth, demand for space-saving solutions, and online retail expansion, while the broader Indian furniture market, including handmade/custom segments, is set to reach USD 72.11 billion by 2033 (CAGR 11.42%), propelled by strong artisanal traditions and government support for MSMEs. The future of the industry likely lies in hybrid solutions that combine modular efficiency with artisanal uniqueness, addressing evolving consumer expectations for affordability, customization, and environmental responsibility. The above review shows the rise in modular furniture but we don't know if it is because of the market or changing preferences that has led to this change. This study shall help to answer it.

3. Methodology

This research utilizes a mixed-methods strategy, combining both qualitative and quantitative methods within a framework of data triangulation to explore the shift from traditional handcrafted furniture to modular furniture. Using various data collections improves the reliability of the findings by providing a range of viewpoints. Data gathering included an online survey, interviews, and literature review. Two surveys were conducted with Survey 1 (57 respondents) who were professionals in the field and Survey 2 (100 respondents) who were end-users. The purpose of the survey was to understand what drives preferences, reasons for choosing specific furniture types, cost, durability, and aesthetics. It also examined whether participants preferred handmade or modular furniture. The quantitative results were analyzed to detect trends and patterns in consumer behavior. For qualitative insights, interviews were held with professionals such as carpenters, interior designers and modular furniture employees in the furniture industry. The conversations concentrated on topics like the changing trends in furniture production, the materials utilized, and the expectations of contemporary consumers. In addition to the survey and interviews, a literature review was performed to provide context and background for the research. This involved studying scholarly articles and industry reports that highlight the changes of furniture design and current trends. The literature review helped in understanding the findings of survey

and interview and their interrelation. The three data—survey results, interview findings, and literature—were collectively analyzed to attain a thorough understanding of the topic. This approach allowed the study to explore various viewpoints through which the study could be confirmed and validated. Based on gaps identified in the literature and emerging market trends, the study proposes the following hypothesis:

H_1 : Younger urban consumers are more likely to prefer modular furniture than older consumers.

The corresponding null hypothesis is:

H_0 : There is no relationship between age group and preference for modular versus handmade furniture.

This hypothesis is tested through comparative analysis of age-wise survey responses, cross-tabulation, and triangulation with interview insights.

4. Data Collection

The data for this study was collected using 3 techniques to support data triangulation and in turn confirm the hypothesis. Two surveys were conducted: one aiming professionals in the furniture, architecture and interior design industry (57 respondents) and the other end user consumers (100 respondents). The survey for professionals sought their insights on market trends, client preferences, recommendations, and the practicality of maintaining handmade furniture in today's market environment. On the other hand, the consumer survey focused on lifestyles, buying habits, preferences, and the factors affecting their decisions between handmade, modular, or a mix of both types of furniture. These two surveys had common grounds which helped in comparative analysis of both the surveys helping in understanding the gap if any between the thought process of users and professionals. Moreover, unstructured interviews were held with people working closely in the furniture industry to get a better understanding of market trends, consumer demands and their alignment with the product they receive. These conversations offered valuable viewpoints on the increasing popularity of modular furniture, the difficulties encountered by the handmade furniture sector, and possible strategies to maintain its significance. Discussion topics covered the decline or difficulties posed in handmade craftsmanship, the functionality and durability of modular features, and opportunities for merging both styles. Lastly, a market analysis on trends in the furniture industry in India was completed as part of the literature review.

5. Data Analysis

5.1 Survey 1: Modular or Handmade - Insights from Industry Professionals on Evolving Furniture Trends

Among the respondents, 87% identified as architects, with 30% of them possessing over 10 years of professional experience and 20% having less than 2 years of experience. Within this group, 29% were affiliated with architectural firms or academic institutions, while 24% operated as freelancers or firm owners. Additionally, 8% were involved in contractor-based roles. This reflects a professionally diverse sample, consisting of a blend of practice, academia, and entrepreneurs. Among industry professionals, those with over two years of experience show a clear preference for handmade furniture (24%) over modular (16%), whereas those with less experience prefer both equally. Industry professionals highlighted quick delivery, modern aesthetics, and affordability as the primary reasons for preferring modular furniture. In contrast, handmade furniture was favored for its potential for customization, distinctive design features, and extended durability. Despite these differences, modular furniture is

largely selected for applications such as kitchens, wardrobes, and sofas, according to industry insights. Professionals reported the main challenges associated with modular furniture to be limited customization options, concerns over material quality, and post-installation dissatisfaction expressed by clients. The challenges associated with modular furniture often stem from its lower durability compared to handmade options. Conversely, while handmade furniture is generally deemed more resilient, it faces challenges such as reliance on skilled artisans, financial limitations, and extended production durations. Yet, experts have pinpointed substantial growth potential in both types of furniture. There was a clear understanding that improving quality and design standardization, along with incorporating customized solutions, could boost the reliability and attractiveness of modular furniture. At the same time, handmade furniture provides distinct value by supporting local craftsmanship, offering high levels of customization, and aligning with luxury design trends. Survey findings reveal that 64.9% of professionals predict that, over the next decade, the industry will gravitate more towards modular furniture. However, to foster the growth of the handmade furniture market, experts stressed the importance of adapting to modern consumer demands, especially regarding affordability, access to labor, and integration with modular designs. The primary recommendation promotes a hybrid approach that combines the practicality of modular furniture with the benefits of artisanal methods, addressing market demands while preserving traditional craftsmanship.

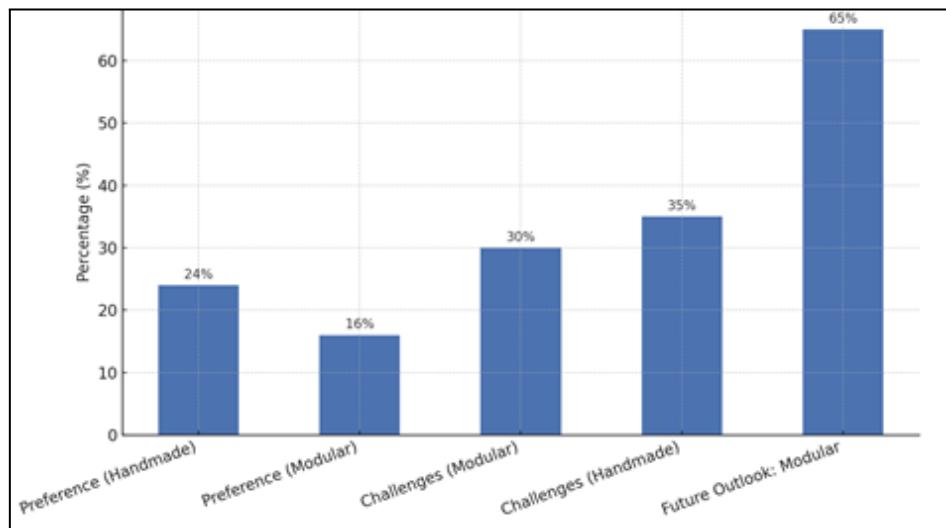


Fig. 1. Survey 1: Industry Professionals - Furniture Preferences, Challenges, and Outlook

5.2 Survey 2: Consumer Insights on Furniture Preferences & Market Awareness

The analysis reveals a delicate divide in consumer preferences between handmade/customized and modular/assembled furniture, based on age, gender, income, and type of residence. Younger individuals (18–34) favor modular furniture (31%) for its affordability and portability, while older consumers (35+) lean towards handmade options (31%) for their craftsmanship and durability. Gender-wise, preferences are nearly even, with a slight female tilt towards modular (22.8%). Residents of owned homes and independent houses prefer handmade pieces for their permanence and value, whereas renters opt for modular due to convenience and lower cost. Higher-income groups (₹15L+) show a strong preference for modular (45%), reflecting modern lifestyles, while middle-income consumers are evenly split, and lower-income groups show limited preference for either, largely due to affordability concerns.

Awareness of modular brands like IKEA is high (91%), but unfamiliarity is more common among those earning below ₹5L annually. Key purchase drivers include cost-effectiveness (71%), durability (69%), and customization (60%). Most consumers buy from local carpenters or showrooms, though 48% have purchased online. In modular furniture, design (84%), value for money (71%), and ease of assembly (61%) are prioritized, though challenges include limited customization (43%), poor durability (25%), and difficulty in assembly (21%). Handmade furniture is valued for durability (61%), unique design (55%), and craftsmanship (47%), but barriers include high cost (51%), long production time (49%), and limited availability (28%). Consumers would consider handmade furniture if it were more locally available (56%), cost-effective (45%), and faster to deliver (39%). Modular's appeal would grow with modern design options (64%), cost-effectiveness (50%), and ease of assembly (46%). Although 69% view modular as the future, improved durability (66%) and customization (61%) are essential for innovation. Handmade furniture retains appeal for its quality, especially among high-income groups, with many willing to pay more if delivery and warranty conditions improve. A generational shift is apparent. To examine the hypothesis (H_1), responses from the 157 participants were grouped by age and preference category. Cross-tabulation revealed a clear directional trend: consumers aged 18–34 preferred modular furniture at substantially higher rates than those aged 35 and above. In both surveys combined, younger respondents consistently ranked affordability, portability, and modern design as priority factors, whereas older respondents emphasized durability and craftsmanship. This pattern, reinforced in both professional and consumer datasets, supports rejection of the null hypothesis (H_0) and confirms that age is a significant predictor of modular preference. These results support the hypothesis that younger people choose modular furniture mainly because it fits their lifestyle.

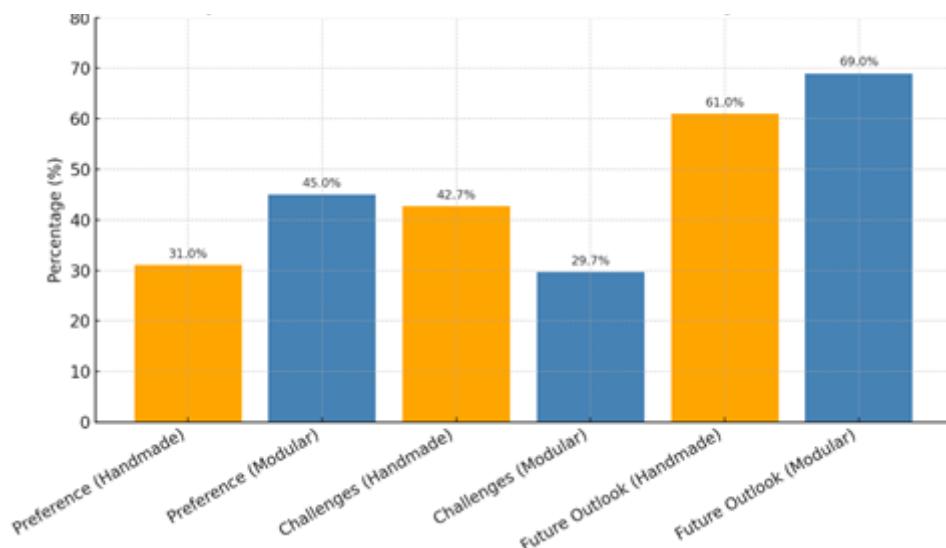


Fig. 2. Survey 2: Consumers - Furniture Preferences, Challenges, and Outlook

Table 1: Comparative analysis of both the surveys under defined aspects

Aspect	<i>Survey 1: Industry Professionals</i>	<i>Survey 2: General Consumers</i>
Experience-based preference	Professionals with >2 years prefer handmade (24%) over modular (16%)	Younger consumers (18–34) prefer modular (41%); older (35+) prefer handmade (31%)
Occupation	87% architects; 29% firm/academic; 24% freelancers/owners; 8% contractors	Mixed population across ages, income levels, and housing types
Reasons for Modular Preference	Quick delivery, aesthetics, affordability	Affordability, portability, modern design, ease of assembly
Reasons for Handmade Preference	Customization, uniqueness, durability	Craftsmanship, durability, uniqueness
Challenges in Modular	Limited customization, material quality, client dissatisfaction	Limited customization (43%), poor durability (25%), hard to assemble (21%)
Challenges in Handmade	Skilled labor dependency, cost, long production time	High cost (51%), long delivery time (49%), availability (28%)
Purchase Drivers	Efficiency, design standardization, integration with custom features	Cost-effectiveness (71%), durability (69%), customization (60%)
Future Outlook	64.9% believe modular is the future; support for hybrid approach	69% see modular as future; improved durability (66%) & customization (61%) as drivers
Brands Awareness	Awareness is there	91% aware of brands like IKEA; low-income group (<₹5L) mostly unaware
Where they buy from	Customized as per client	Local carpenters, showrooms; 48% have bought online
Modular Preference	Efficiency, scalability, aesthetics	Design (84%), value (71%), assembly ease (61%)
Handmade Preference	Customization, craftsmanship, quality	Durability (61%), design uniqueness (55%), craftsmanship (47%)
Challenges in Handmade	Budget, labor availability, delivery time	Availability (56%), cost (45%), delivery speed (39%)
Challenges in Modular	Material quality, post-installation issues	Durability, customization, assembly
High-Income Preference	Open to investing in handmade if efficiency improves	19/35 high-income respondents willing to pay more for handmade

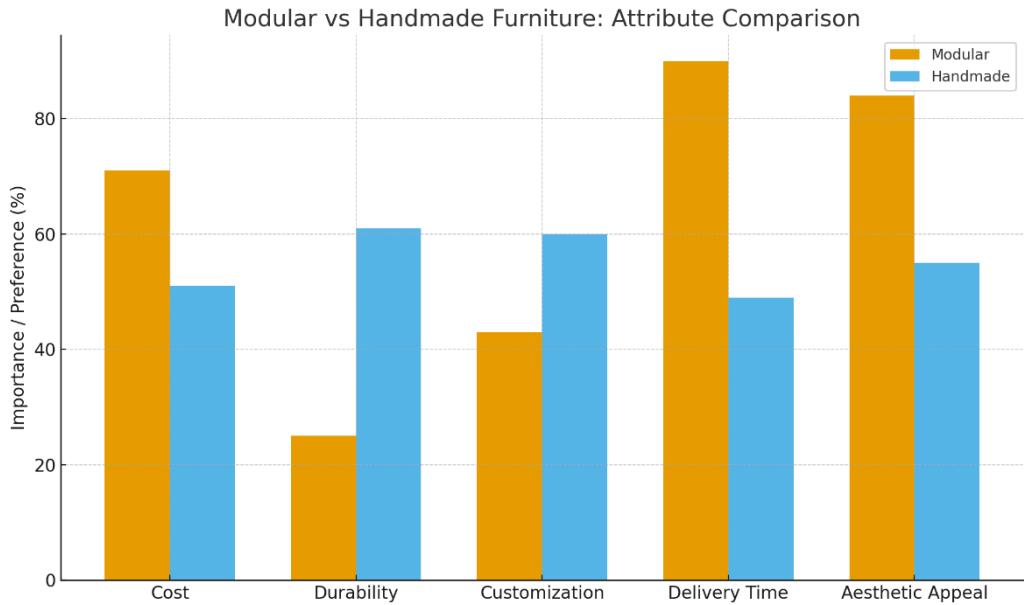


Fig. 3. Comparison between modular and handmade furniture based on survey responses.

5.3 Interview

An unstructured interview was conducted with users, traditional artisan, carpenters, furniture retailers, modular furniture workers to grasp an understanding of how the market has changed over the years. The interview emphasized on the variety of cultural, emotional, economic, and practical elements that together contribute to the transition from handmade to modular furniture in today's times. The initial excerpt that came across was the imbalance between emotional significance and practical utility. Handmade furniture often carries emotional memories, tradition, customization and craftsmanship. Numerous users expressed a sentimental connection to heirloom pieces or items created by local craftsmen. On the contrary, modular furniture is perceived as practical, economical, and well-suited for the fast-paced lifestyles. While users appreciate the charm and individuality of handmade creations, they frequently choose modular options for their suitability for smaller living spaces. This suggests a generational change in values, where practicality and fast life frequently takes over emotional bonds. It underscored the relationship between time, skill, and the diminishing patience in modern consumer habits. Traditional artisans emphasized the uniqueness and time-consuming nature of each handmade product. (fig.4) represents the extent of customization that can be achieved with handmade craftsmen in modern wardrobe design. Their stories revealed a profound pride in their craft, with each item mirroring their identity and commitment. They now however face challenges such as demand in quick production, low cost, easy availability and prompt delivery. The conversations led to highlighting the disconnect that has been created due to their principles and market demand, which in turn leads to the concern of safeguarding traditional skills and knowledge. The furniture manufacturers were probed about the changing trend and their point of view about the artisans and mass production. Their take was that in furniture manufacturing, mass production happens according to the design, layout and finishes which makes it easily available to the consumer. Though there are issues like durability, limited customization, the ease of availability; good marketing and affordability has made modular furniture successful. Also, Modular systems allows consumers to experience a sense of ownership and creativity within a standardized item. As shown in the (fig.4) the modular

design of comes in standard sizes and can be assembled by the clients by themselves giving them the sense of creativity. Another observation was the tension between tradition and contemporary living. The evolving nature of housing, characterized by smaller urban residences, frequent moves, and compact nuclear families, has greatly affected furniture choices. Handmade furniture, recognized for its solidity, bulk and permanent design, does not always meet the flexible demands of modern spaces. Whereas, modular furniture is lightweight, portable, and easily assembled or disassembled. This significant difference shows adaptability is preferred over stability. The materials used for modular furniture are cost-effective and facilitate mass production but raised questions regarding long-term durability. The industry professionals like architects and interior designers also pointed out during the interviews that the craftsman availability is an additional issue. Though everyone desires handmade furniture, consumers are not ready to give it the time and money required for fine workmanship. Only people of higher income group or older generation understand the value of the unique pieces created in handmade furniture. To address the mass a hybrid solution is required where consumers can get unique pieces but still be modular in nature. Also, an awareness about the skills and knowledge our artisans have needs to be spread. Most of Architects/interior designers have then sought a mid-way to incorporate both modular and handmade furniture into a household to better fit with the demands of quick delivery and cost effectiveness. The shift towards modular furniture captures a fast urban lifestyle and consumer behavior influenced by speed, flexibility, and affordability.



Fig. 4. Comparison of handmade wardrobe (left) and modular wardrobe (right) . **(Source: Author)**

6. Results and Discussion

Urbanization in India increased from 34.03% in 2018 to 35.87% in 2022 (World Bank, 2023), considerably transforming consumer lifestyles and resulting in a greater need for contemporary, space-saving, and multifunctional furniture options. This trend is particularly prominent among young professionals and nuclear families, whose preferences have driven the growth of the modular furniture market. The global modular furniture market is projected to reach USD 130.6 billion by 2034, with the Indian market expected to grow to USD 7.53 billion by 2033 (Market Research Future, 2023). Survey findings align with this shift, indicating that modular furniture is favored for its affordability, quick delivery, and contemporary aesthetics, while handmade furniture remains valued for its durability,

customization, and emotional significance—especially among experienced professionals and high-income consumers. Over 64% of respondents across both consumer and professional groups identify modular furniture as the future of the industry, although challenges such as limited customization and material quality persist. The analysis shows that the modular sectors success depends

on efficiency with personalization, with semi-customizable designs increasingly mimicking the uniqueness of artisanal craftsmanship (Rao & Sen, 2023). The interview and its analysis underline the above conclusion of modular being the future due to its ability to adapt with the change like rental culture, fast paced living, but also highlights the plight of artisans, limited accessibility, cost and their readiness for change. Through data triangulation one can find the common aspects on which all the three modules stress on. Firstly, it establishes the shift that modular furniture is going to dominate the industry, secondly it highlights pros and cons for handmade and modular furniture and lastly it demands of hybrid solution that can satiate both where modern consumer demands are responded to while preserving tradition thus enhancing unique value and functional appeal and the artisans' values in tradition. Triangulation of the three data sources strengthens this argument: Survey data reveal clear age-wise preference variations.

while interviews explain why these patterns occur and the literature confirms that urbanization and market globalization favor modular expansion. Together, these form strong evidence to support modular furniture's growth while highlighting the relevance of handmade craftsmanship.

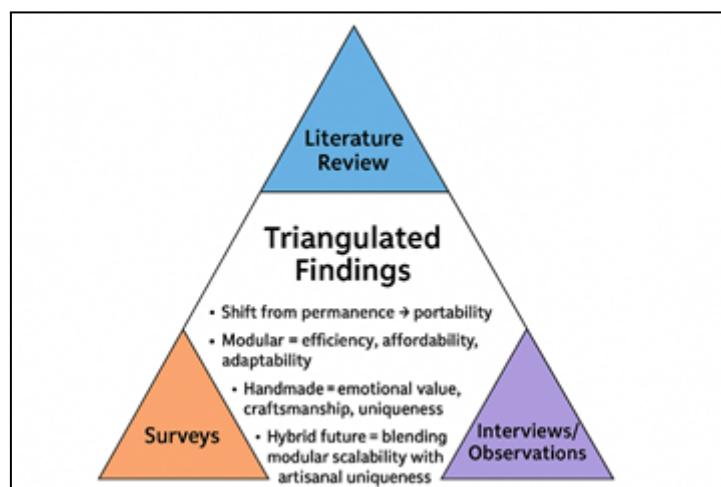


Fig. 5 Triangulation Method used for Data Analysis

7. Conclusion

In conclusion, the shift from handmade furniture to modular furniture signifies societal change due to lifestyle changes, technological advancements, trends and evolving consumer preferences. It also highlights that practicality and affordability have taken a higher ground than art and tradition. Although handmade furniture is everyone's desire due to its distinctive craftsmanship, emotional ties and unique value, modular furniture adapts to the modern, fast paced, impatient lifestyle. It offers affordability, accommodates space constraint, and gives a feel of customization. The analysis indicates the younger population tends more towards modular furniture and are likely to buy from online portals such as IKEA, Amazon, Livspace, etc. for the newness it delivers and for the permutations it offers for smaller living environments. The older generation, although lean towards the handmade furniture, still accept modular's functionality it offers in specific areas such as kitchen, sofas, etc. the increasing popularity of modular furniture is not just about change of preferences but a reaction to modern lifestyle. This transition raises concern for the traditional skills and craftsmanship and the challenges the artisans face to keep up with the changing times. In spite of these obstacles, manufacturers of modular furniture have found ways to include customizable elements, simulating the distinctiveness of handmade items within a standardized manufacturing framework. The findings

support the hypothesis and show that age and everyday lifestyle needs, more than design preferences, are driving this change in the furniture market. This transition raises concern for the traditional skills and craftsmanship and the challenges the artisans face to keep up with the changing times. In spite of these obstacles, manufacturers of modular furniture have found ways to include customizable elements, simulating the distinctiveness of handmade items within a standardized manufacturing framework. The analysis also points towards a combination of the two systems to form a hybrid solution which shall cater to the issues faced by both the systems. This approach suggests a blend between mass production and uniqueness, satisfying today's customer's needs and transforming the furniture sector. (fig.6)



Fig. 6 An example showing a rocking chair traditionally a handicraft work converted to hybrid model where it is converted to modular parts and combined to make a unique piece that looks handmade but is modular.

(Source: Author)

The future is not about which system or style shall hold the stakes but in development of a hybrid furniture system that combines efficiency of modular design with uniqueness of tradition. To remain competitive, a bridge between tradition and trend needs to form to create more sustainable, scalable, customized product to appeal the present fast-paced life. The findings suggest that modular manufacturers must invest in material quality, repairability, and modular-handmade hybrid options to maintain long-term market relevance. For policymakers, supporting artisan training programs, cluster development, and integration of digital fabrication tools could help sustain traditional craftsmanship while enabling it to participate in modern supply chains.

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