

INSIGHTS ON PRO AV MARKET FROM INDUSTRY LEADERS

Indian pro AV industry is entering a defining phase where technology is no longer viewed as a support function, but as a strategic driver of experience and engagement. From hybrid workplaces and immersive classrooms to hospitality segment, live events, command centres, and premium residential spaces, the market is expanding rapidly across sectors with increasing complexity and technological innovation. As India strengthens its position as a global hub for enterprise operations, infrastructure development, and digital transformation, pro AV ecosystem is evolving alongside, shaped by customer expectations and the need for scalable, future-ready solutions.

In this special cover story, AV-ICN Expo Magazine team brings together insights from multiple industry leaders across the Indian pro AV landscape to understand where the market stands in 2026 and where it is headed next. This interview series explores the key growth sectors, emerging opportunities, persistent challenges, and technologies shaping the future of the industry. More importantly, this feature reflects AV-ICN's continued effort to go beyond product conversations and spotlight the larger industry narrative that defines how India's pro AV market is transforming into an experience-led, innovation-driven force globally.

KEY CHALLENGES FACING THE INDUSTRY

- Pro AV faces acute **talent shortage** as there is no formal education that would naturally graduate you into our industry, people with generic engineering backgrounds like a mechanical, electrical, and electronics find their way into our industry by and large by chance.
- Since majority of the components are still coming from China, the **supply chain** can turn into a nightmare when the geopolitical situation changes.

GROWTH SECTORS & EMERGING OPPORTUNITIES

From an IFFD point of view **education** will always be a sector of focus for us but from an overall pro AV industry perspective GCC is the biggest growth factor that we foresee. At the start of this year there were around 1850 GCC's in the country, which is going to go up by 20-25% in the next 18 months' time. The GCC's basically build tech heavy offices that require a lot of pro AV set ups.

PROPELLING DRIVERS IN INDIA'S PRO AV

I would say the quality and quantity of tech manpower that is available in the country is the biggest reason for growth, as that is the single biggest factor for various international organisations to choose India as their destination for establishing their GCC's.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

We are focusing on collaborating with local content providers, which would enhance the capabilities of our displays and at the same time give a complete customised and localised solution to our customers from the education segment.



Rohit A.K., Director of Sales - India and Middle East, Avocor

KEY CHALLENGES FACING THE INDUSTRY

Talent availability and skill gaps remain critical as AV, IT, and AI converge. The industry needs professionals who can design and manage integrated, software-driven AV ecosystems. **Pricing pressures** and **value perception** are also significant, as customers often evaluate solutions on upfront cost rather than long-term value and lifecycle benefits. Additionally, while supply chain constraints have improved, component dependencies and rapid technology evolution continue to demand agility from solution providers. Lastly, there is a need for standardisation and awareness in certain emerging markets.

GROWTH SECTORS & EMERGING OPPORTUNITIES

Corporate and **enterprise segments** continue to lead the growth trajectory in 2026, primarily driven by the evolution of hybrid workplaces and the need for intelligent collaboration ecosystems. The **education sector** is also witnessing accelerated adoption, especially with immersive learning environments, simulation labs, and digital classrooms becoming mainstream. Similarly, **hospitality** and **experiential centres** are leveraging AV to differentiate through curated, high-impact guest experiences. Experience centres, smart infrastructure, and command & control environments are also gaining significant traction. Additionally, in niche segments like retail digitalisation, museums, and immersive brand spaces, storytelling through AV is becoming a key engagement driver.

PROPELLING DRIVERS IN INDIA'S PRO AV

Multiple macro and technological factors are driving the growth of Indian pro AV. At the forefront is **digital transformation**, where AV technologies are central to enabling seamless communication, data visualisation, and decision-making.

Simultaneously, **infrastructure development** and **smart building initiatives** across corporate campuses, airports, metro networks, and public spaces are creating a strong foundation for AV integration. Another key driver is the increasing focus on user experience and engagement, where organisations are investing in immersive and interactive technologies to create lasting impressions.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

In 2026, our focus is strongly aligned with technologies that deliver immersive, intelligent, and scalable experiences, prioritising:

- Advanced visualisation solutions, including large-format LED, spatial displays, and holographic technologies
- AI-driven AV systems, bringing automation, analytics, and personalisation into collaboration and control environments
- Integrated collaboration ecosystems
- Immersive audio solutions, including beamforming and spatial audio

These priorities are closely aligned with customer expectations around simplicity, scalability, sustainability, and ROI-driven deployments.



Sachin Hallikeri, CTO, Online Instruments (India) Limited

KEY CHALLENGES FACING THE INDUSTRY

As a Made-in-India company, I believe we're enhancing the existing user ecosystem by addressing a significant pain point - **the substantial cost of technology upgrades** that makes it difficult for users to shift over-night.

GROWTH SECTORS & EMERGING OPPORTUNITIES

Live events and **broadcast** where uncompressed form of raw video needs to run smoothly with reliability seems to be a good growth opportunity for the Indian pro AV market today.

PROPELLING DRIVERS IN INDIA'S PRO AV

One of the key growth drivers is **digital transformation** with use of local networks making pro AV a part of its ecosystem.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

Out of the many options available in the Indian pro AV ecosystem, I would choose IPMX or Dante AV Ultra for sure. These technologies are redefining AV infrastructures, leading the pro AV market.



Hemal Bhatt, Founder & CEO, N-Labs on Behalf of Nbuzz AVL LIMITED

KEY CHALLENGES FACING THE INDUSTRY

Supply chain issues have intensified due to global uncertainties and logistics disruptions. In fact, companies continuously adjust schedules and coordinate with suppliers to maintain project timelines. **Fluctuations in global currencies**, especially the rise of the dollar and euro against the rupee, have also increased the overall cost of products. Along with this, inflation continues to increase operational expenses. There is also a **growing need for trained individuals** who understand both design and execution. Focusing on training, education, and certifications, especially those offered by global brands, can help build a stronger workforce.

GROWTH SECTORS & EMERGING OPPORTUNITIES

India's pro AV industry is witnessing well-distributed growth across **corporate, education, hospitality, live events**, and **government segments**, driven by infrastructure, technology, and overall user experience. Live events sector is expanding through concerts, corporate events, cultural festivals, and large public gatherings with many international and domestic artists actively touring across India. Departments in government and corporate sector are investing in modern conference rooms. New auditoriums and convention centres are also being developed, requiring AV solutions for smooth communication. Emerging light and sound installation projects at heritage sites, interactive museum experiences, and AV systems in places of worship are also gaining attention. These developments are expected to continue expanding in the coming years ahead.

PROPELLING DRIVERS IN INDIA'S PRO AV

Factors like **infrastructure development** and ongoing shift towards **digital transformation** are creating steady demand as more new-age spaces are now being designed with pro AV technology as a core requirement rather than an afterthought. Restaurants and hotels focus on ambience through zoned audio, while podcast studios require clean and controlled sound. Educational institutions are investing in smart classrooms, and fitness centres are using strong audio systems to create more engaging environments. Digital transformation is changing how these systems are integrated and managed regularly. There is a growing preference for seamlessly connected solutions that are also easy to operate, flexible, and scalable.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

In 2026, there is a clear focus on digital AV technologies. The shift from analog to digital is becoming essential, as customers now expect better control, cleaner signal flow, improved reliability, and easier integration across multiple systems and applications. Network-based systems have significantly changed the challenging work of managing multiple cables, separate routing, and troubleshooting. Most setups now rely on minimal cabling, mainly standard network cables, making systems more organised, scalable, and manageable. AV-over-IP transmits audio and video signals over network infrastructure across applications from conference rooms to large-scale events. DANTE and MILAN are also becoming preferred audio networking protocols for stable, synchronised distribution, while SDVoE is increasingly important for high-quality, low-latency video distribution.



Vikram Yadav, Founder & Director, Erthpot

KEY CHALLENGES FACING THE INDUSTRY

The biggest challenge in India isn't demand—it's **bridging the gap between price and perceived value**. With the increasing interest in premium solutions and the growing competition from lower-cost alternatives, the focus needs to shift toward communicating long-term value, especially for solutions like advanced visualisation platforms, where differentiation lies in experience, consistency, and ease of use over time.

GROWTH SECTORS & EMERGING OPPORTUNITIES

From India perspective, **corporate, education, hospitality**, and **live events** continue to be strong growth engines for the pro AV industry. However, what's increasingly becoming significant is the emergence of the **premium residential segment**. Rising disposable incomes and a shift toward experience-led consumption are driving demand for immersive AV setups at home—extending beyond home cinema into OTT, gaming, and live content. We're also seeing strong traction in **experience-led environments** such as luxury retail and hospitality, where high-quality visualisation solutions, including large-format displays and projection systems, are becoming central to customer engagement.



Rajeeva Lochan Sharma, Managing Director – India, Barco

PROPELLING DRIVERS IN INDIA'S PRO AV

Rising incomes and urbanisation are fuelling demand for premium home entertainment, while enterprise-led digital transformation is accelerating investments in collaboration and visualisation technologies. Hybrid work is no longer a trend in India; it's the foundation shaping AV investments. In this context, seamless and wireless collaboration platforms are becoming increasingly important in enabling consistent meeting experiences across distributed teams. At the same time, the expansion of digital-first businesses is creating new use cases across operations, control rooms, and command centres, where integrated visualisation and workflow platforms are helping organisations manage complexity and make faster, more informed decisions.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

Our focus is on enabling seamless, experience-led solutions across both enterprise and entertainment segments. In enterprise environments, the demand is for intuitive, wireless, and secure collaboration solutions that simplify user experience and improve productivity. Immersive visual technologies—ranging from high-brightness projectors in cinema and projection mapping, to advanced LED and video wall systems—are also gaining traction across entertainment and public venues, reflecting a broader shift toward experience-driven investments.

KEY CHALLENGES FACING THE INDUSTRY

A major challenge in India's pro AV market is the **gap between price sensitivity and performance awareness**. Many customers evaluate solutions primarily on cost without understanding quality's impact on experience. Another challenge is **knowledge gap** at the integrator level, especially with high-end projection systems requiring deeper design and calibration understanding. Increasing LED competition exists even where projection offers better immersion or cost efficiency. Manufacturing faces complexity in maintaining consistency in advanced materials and coatings. Industry also faces technical expertise shortages in optical performance, calibration, and system integration.

GROWTH SECTORS & EMERGING OPPORTUNITIES

For us at Lumina, growth is clearly moving toward experience-led environments rather than traditional AV installations. The strongest demand is coming from **premium residential home cinemas**, where customers are now investing in fully engineered cinema rooms. Studios and content creation spaces are also expanding rapidly, driven by OTT platforms and the need for controlled, high-performance viewing environments. **Live events** and **experiential AV** are also seeing strong momentum, with increasing demand for large-format, visually impactful setups. We see strong potential in **luxury hospitality screening rooms, simulation and training environments, private preview theatres, and high-end gaming or entertainment spaces** also.

PROPELLING DRIVERS IN INDIA'S PRO AV

The biggest shift is from **functional to experiential AV**. Customers now seek complete visual experiences rather than just display solutions, driven by rising affluence, premium in-home entertainment preferences, and the explosion of OTT content, gaming, and high-resolution media. Live events and experiential marketing contribute significantly, while hybrid work and digital infrastructure continue to support corporate and institutional demands. Advancements in projection technology are increasing the screen's importance as a critical performance component.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

At Lumina, our focus is on high-performance, application-specific screen surfaces rather than commoditised products. We are prioritising dedicated home cinema screens that offer high contrast and acoustic transparency, as well as ALR surfaces that perform well in spaces with limited light control. With the rise of laser projection and HDR content, we are also focusing on high-gain and HDR-compatible surfaces that maintain uniformity and contrast. We already offer a reference-grade projection surface for colour-critical studio environments and are continuously advancing screen technologies to deliver higher contrast, deeper blacks, and more vivid colour reproduction.



Yusuf Galabhaiwala,
Operations Director,
Lumina Screens

KEY CHALLENGES FACING THE INDUSTRY

The **lack of skilled technical expertise and inadequate post-sales support** is the biggest challenge, particularly in areas such as LED, networked AV, and integrated systems. While the market has grown rapidly, there is a clear gap in system design, installation quality, and lifecycle service, leading to poor user experience and underutilisation of AV systems after deployment. **Pricing pressure** is another concern, with aggressive competition sometimes compromising quality and long-term reliability. Although **supply chain issues** have eased, the currency volatility and import dependencies continue to impact pricing and planning.

GROWTH SECTORS & EMERGING OPPORTUNITIES

Corporate sector continues to be the largest driver of pro AV demand in India with organisations increasingly investing in immersive, technology-led environments to enhance collaboration, brand storytelling, and client interaction. **Government spending** is another major growth engine, with significant investments in auditoriums, convention centres, museums, tourism infrastructure, and smart city projects. These projects are growing not just in volume but also in complexity, requiring world-class AV design and execution. **Education**, particularly smart classrooms and hybrid learning, is also gaining strong traction, with institutions investing in interactive displays, conferencing systems, and high-quality audio. Niche segments like **healthcare, houses of worship, and premium residential developments** are beginning to adopt more sophisticated AV solutions.

PROPELLING DRIVERS IN INDIA'S PRO AV

Multiple factors drive pro AV growth in India. Foremost is **digital transformation**. Unified communications, content delivery, and real-time collaboration make AV infrastructure a core business requirement rather than a discretionary investment. Hybrid work models accelerate this shift, increasing demand for high-quality collaboration environments, conferencing systems, intelligent audio, and integrated AV platforms. **Experiential marketing** is a powerful driver across retail and hospitality. Brands compete on experience, not just product or price, creating immersive, engaging environments through sound, visuals, and interactive technologies. **Infrastructure development** including commercial real estate, airports, convention centres, and public projects, also plays a critical role. Organisations view AV as a strategic enabler of productivity, engagement, and brand positioning.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

In 2026, our strategic focus is accelerating enterprise and commercial AV segments, which we see as the next major growth engine. PRO FX is strengthening its portfolio with comprehensive professional audio solutions and digital display technologies. This aligns with evolving customer expectations. Enterprise and commercial environments demand high-performance, scalable, and aesthetically integrated AV solutions. There's a clear shift towards systems delivering consistency, reliability, and immersive quality, not just functionality. Professional audio is seeing renewed focus as clients recognise its critical role in delivering impactful experiences. In many ways, PRO FX is replicating the service-led approach from our home audio success into the professional domain.



*Manmohan Ganesh,
Managing Director, PRO
FX Tech*

GROWTH SECTORS & EMERGING OPPORTUNITIES

We continue to see strong growth in **enterprise and government sectors**, driven by workplace transformation and digital infrastructure. **Corporate environments** focused on hybrid collaboration remain a key priority, alongside **education and public-sector projects** requiring scalable, standardised deployments. We're also seeing emerging opportunities in **hospitality, themed entertainment, and large campuses**, where the focus is on delivering consistent, experience-driven environments across entire places—not just individual spaces.

PROPELLING DRIVERS IN INDIA'S PRO AV

Growth is being driven by **infrastructure development, digital transformation, and hybrid work**, with the most significant shift being the acceleration of AI and data-driven automation. Organisations are moving away from fragmented AV systems toward unified, platform-based approaches that integrate audio, video, control, data, and cloud—enabling more connected, intelligent environments.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

Our focus in 2026 is on creating AI-driven intelligent spaces through the brand's Full Stack AV platform, with a strong emphasis on end-user experience.



*Rajesh Mittal, Vice
President, Q-SYS*

KEY CHALLENGES FACING THE INDUSTRY

While the industry continues to navigate familiar challenges such as pricing pressure, supply chain complexity, and talent availability, the most significant challenge in India today is **currency fluctuation**, particularly for the US Dollar. Currency volatility has a direct impact on project costs, pricing predictability, and customer decision timelines, particularly in a market that remains highly price sensitive. Rapid exchange rate movements can compress margins or delay investments, even when demand fundamentals remain strong. As a result, customers are placing greater emphasis on long-term value, reliability, and lifetime performance, making cost stability and total cost of ownership increasingly central to purchasing decisions in the Indian pro AV market.

GROWTH SECTORS & EMERGING OPPORTUNITIES

Live events remain India's strongest pro AV growth driver in 2026. Large concerts, corporate launches, brand activations, sporting events, and cultural showcases, prioritize scale, impact, and reliability, driving demand for high-brightness projection, large LED displays, and robust image processing. Immersive environments are also emerging across **corporate, education, museums, experience centres, and public spaces**, shifting from information delivery to experience creation. Hybrid deployments combine projection and LED to match technology to audience, layout, and purpose. While corporate demand faces short-term softness, NOCs, command centres, and control rooms grow strongly. The strongest opportunities lie in experience-led and mission-critical applications.

PROPELLING DRIVERS IN INDIA'S PRO AV

Infrastructure development is the primary driver of India's pro AV sector, underpinned by government investment in tourism, urban development, and large public venues. National and state initiatives upgrading tourist destinations, heritage sites, transportation hubs, and infrastructure create strong demand for professional projection, LED, and integrated AV systems emphasising immersive storytelling, destination experiences, and large-scale visual impact. While **digital transformation** and **hybrid work** contribute incrementally, infrastructure-led investments drive bigger budgets, larger deployments, and longer cycles, making them the most significant growth engine for Indian pro AV today.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

For 2026, our focus is on evolving customer needs. Direct-view LED sees strong demand across live events, experience centers, transportation hubs, and corporate environments, increasingly specified for indoor and outdoor applications requiring visual impact and modular designs. High-brightness projection is critical for large venues, immersive attractions, cultural tourism projects, and government infrastructure, delivering consistent performance in challenging conditions. Both support experience-driven and mission-critical applications requiring visual quality, reliability, and scalability.



Rishabh Nayar, Pro AV Sales Director for India, Christie

KEY CHALLENGES FACING THE INDUSTRY

Pricing pressure remains one of the biggest challenges in the Indian market, where customers expect advanced technology at competitive costs. Manufacturers are focusing on the Make-in-India initiatives. However, we still face challenges covering important aspects of the product lifecycle including **product design, sourcing, manufacturing, and chip availability**. India still has a long way to go before we can become truly self-reliant in these aspects. Another major challenge is the shortage of skilled AV professionals. As AV systems become more IT-driven and sophisticated, the industry requires better technical training and certification programs.

GROWTH SECTORS & EMERGING OPPORTUNITIES

The **corporate sector** continues to be the primary driver, particularly with organisations upgrading collaboration spaces to support hybrid work and interoperable meeting environments. The focus has shifted from simply adding more meeting rooms to creating smarter, AI-enabled, easy-to-use collaboration spaces. **Education** is another major growth driver. Institutions are increasingly investing in lecture capture, hybrid classrooms, digital learning studios, and campus-wide collaboration infrastructure. Educational spaces are now being viewed as "content delivery infrastructure" rather than just classrooms. **Healthcare** is emerging as a particularly promising vertical in India. There is rising adoption of telemedicine, surgical recording, ICU collaboration systems, and medical training infrastructure.



Koreth Mathew, Director, A&T Video Networks

PROPELLING DRIVERS IN INDIA'S PRO AV

Indian pro AV growth is fuelled by multiple converging factors. **Enterprises** are reshaping office spaces. Cafeterias, town halls, and large meeting rooms are all going through a metamorphosis. The emphasis is on extraordinary experiences with easy-to-deploy, manageable, and scalable. AV, IT, cloud, and AI convergence is also reshaping the market. Modern AV is an integral part of the infrastructure. Demand has shifted to remotely managed, data-enabled platforms. **Collaboration experiences** are increasingly important. Enterprises want engaging environments, driving investments in immersive displays, collaboration rooms, content studios, and experiential spaces for employees, customers, students, and event attendees.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

In 2026, Indian market is clearly demanding solutions that are intelligent, interoperable, scalable, and easy to manage. A key mission at A&T is prioritising sustainable and energy-efficient AV solutions. Customers today are increasingly conscious of operational efficiency, device longevity, and environmental impact. Another focus point for A&T is AI-enabled conferencing solutions for small, medium, and large meeting spaces. Customers today expect seamless meeting experiences with auto-framing cameras, intelligent speaker tracking, noise reduction, and one-touch operation. We also see strong demand for Dante and AV-over-IP architectures, which provide greater scalability, flexibility, and centralised management capabilities.

KEY CHALLENGES FACING THE INDUSTRY

The most critical challenge is the **imbalance between value creation and financial structuring**. I call it: 'The financialisation of distortion'. We're witnessing a growing divergence between engineering-led system design and credit-driven procurement dependent on currency fluctuation. As an import-dependent sector, we face **lead time unpredictability, cost fluctuations, and logistics disruptions** impacting project execution and working capital. The industry is transitioning toward networked, software-driven ecosystems, but **skilled professionals** aren't keeping pace. This is why knowledge transfer, training, and application engineering are central today.

GROWTH SECTORS & EMERGING OPPORTUNITIES

India's pro AV industry has stopped growing in silos. It is now a contiguous, experience driven ecosystem where every sector is upgrading from 'installation' to 'immersion'. **Live events** are exploding beyond metros. International tours now demand rider-compliant, globally benchmarked systems in Tier-2 and Tier-3 cities like Indore, Lucknow, and Nagpur, resetting the industry's technical baseline. **Houses of Worship** have become high-investment verticals. **Corporate AV** is also now a competitive weapon for talent retention and client engagement. **Education** segment has shifted to campus-wide architectures. Emerging verticals like esports arenas, luxury residential, government-led smart infrastructures, museums, are also redefining AV boundaries. India is now a high-expectation market demanding experience over equipment.

PROPELLING DRIVERS IN INDIA'S PRO AV

India's pro AV growth stems from deep **convergence of technology, infrastructure, and behavioural evolution**. We've moved beyond digitisation from putting screens in rooms to experience orchestration. AV is now central to communication, engagement, and decision-making. The driver is "Convergent Intelligence", where AV, IT, and architectural design become indistinguishable, accelerated by three macro forces:

First, **Return on Experience (ROE)**. AV as differentiator for talent retention, customer engagement, and brand prestige, replacing ROI as the decision metric.

Second, **the hybrid revolution**. Seamless collaboration is now baseline, driving investment in high-performance audio, low-latency video, and unified platforms.

Third, **the infrastructure push with a technology first mindset**. Airports, convention centres, and smart city command centres are now embedding AV at the design stage, not retrofitting it.

The buyer mindset has also shifted from price to long-term performance and experience.

TECHNOLOGIES OR SOLUTIONS SHAPING 2026

In 2026, "we are not selling products. We are delivering architectural ecosystems". Our portfolio strategy is ruthless: if a technology doesn't create a measurable lift in experience or reduce total cost of ownership through reliability and scalability, we don't touch it. We curate for interoperability, future proofing, and rider acceptance. Our five distinct but interconnected layers include spatial and immersive audio, immersive mixing workflows in live sound, intelligent lighting and show control, networked infrastructure, and touring grade reliability and signal integrity. What ties all of this together is a fundamental shift in customer expectation. Clients today are not buying equipment; they are buying immersive, flexible, future ready experiences.



Nirdosh Aggarwal,
*Managing Partner, Hi-Tech
Audio & Image LLP*