

A faint, light-colored world map is visible in the background of the slide, centered behind the text.

# Market For Glasswool And Rockwool Machinery in India

**AGRE'**

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# INDIA- QUICK FACTS

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## Demographics

29 States & 7 Union Territories

Appox. 10 times of Italy in size

22 official languages

1.2 bn Population

## Economic Indicators

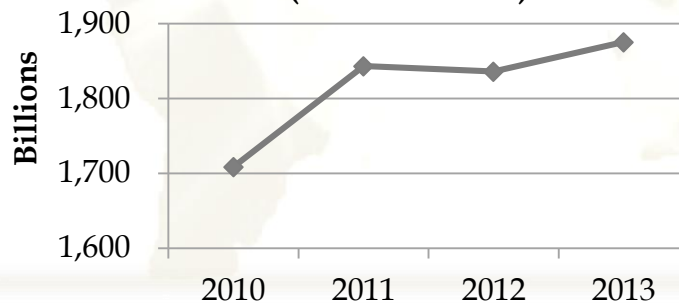
GDP: € 1.73 tn

Per Capita Income: € 1,376

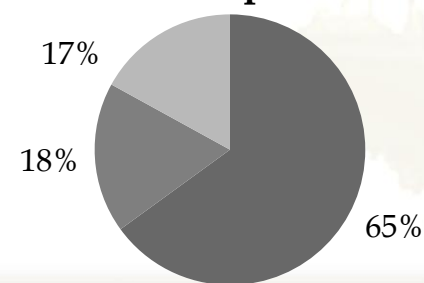
FDI : € 23.58 bn (in Apr'14-Jan' 15)

Forex Reserves: € 320.8 bn

GDP (Current US\$)



GDP Composition



■ Services ■ Industry ■ Agriculture



# GOVERNMENT INITIATIVES TO BOOST DEVELOPMENT

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## Some of The Government Initiatives

*Empowered with a single-party majority for the next five years, Government seems to be proactive as it is putting an emphasis on industrialization and taking several measures for the same...*

### Improved Business Link With 3 Large Economies

**Japan**  
Investment  
commitment of € ..  
bn in infra and  
manufacturing

**China**  
Investment  
commitments of  
€.. bn

**U.S.A.**  
Greater cooperation  
in technology, infra,  
education, health,  
and sanitation.

**Europe**  
Multiple agreements  
under discussion with  
Germany and France

### Improved Business Environment

Overhaul legal  
system and  
expedite the  
processes

Several reform  
measures in  
progress

Steps being taken to  
be in Top 30 of Ease  
of Doing Business  
Index-World Bank in  
next 3 years

### Greater Clarity on Key Issues

Increase in FDI  
limits for several  
sectors

Working on  
investor issues such  
as retrospective  
taxes

### Infrastructure

€.. bn  
allocated  
for roads  
and ports

Build 100 smart cities  
and find innovative  
solutions for affordable  
housing

**AGRE'**

- Make in India is a project by the Government of India designed to transform India into a global manufacturing hub.
- It includes initiatives designed to facilitate investment, foster innovation, protect intellectual property and build quality manufacturing infrastructure.
- It focuses on 25 sectors for job creation and skill enhancement.
- With the exception of space, defense and news media, 100% FDI permitted in the remaining 22 sectors.

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**India can be manufacturing hub for Asia, for supplying to domestic market as well as export to other Asian countries.**

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- ✓ Reduction in production cost
  - ✓ Availability of low cost labor
  - ✓ Availability of raw material
  - ✓ Booming local consumption
  - ✓ Strategic location for exports
  - ✓ Tax reduction initiatives
- 



# **USER INDUSTRY: REAL ESTATE MARKET IN INDIA**

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- In FYXX, the Indian real estate market was valued at around € ... bn, accounting for ..% of the total construction market. It is expected to touch € ... bn by year 20XX.
- It has grown at the rate of ..% in 20XX and is expected to grow at same rate till year 20XX.

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Economic  
Growth

■ .....  
■ .....

Urbanisa-  
tion

■ .....  
■ .....

Rising  
Income

■ .....  
■ .....

Small  
Families

■ .....  
■ .....

### Residential

- Industry players estimate that India would need to develop almost .....mn housing units by 20XX.
  - .....
  - .....
- Residential development till 20XX(bn sq.ft. )**

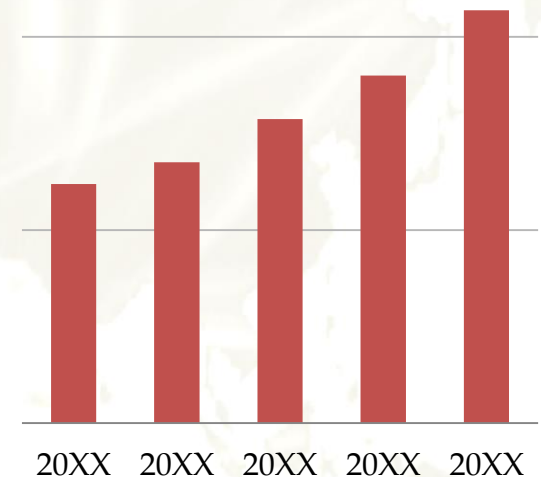
### Commercial

- In India, the growth of the commercial segment (especially office space) has been mainly driven by .....
- Industry experts estimate demand for office space of over .....
- In 20XX, .....were the biggest office market in India with .... mn sq ft, out of which ... mn sq ft were occupied.

### Industrial

- During the period of 20XX-XX, investments of over € ... bn have been made in industrial construction mainly for:
  - .....
  - .....
- .....
- Indian Government is taking measures to promote manufacturing sector, of which some of the key measures are:
  - .....
  - .....

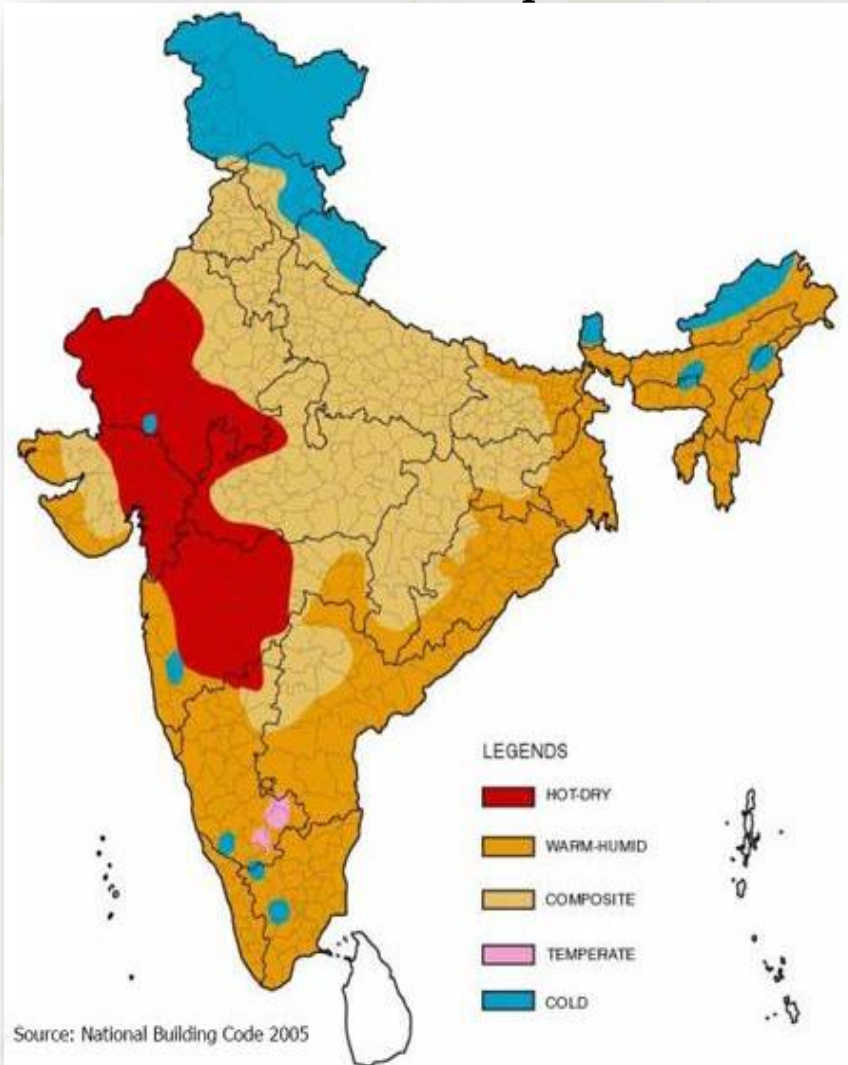
**Investment in Industrial Construction in India (€ BN)**



# CURRENT PRACTICES FOR INSULATION AND EVOLVING STANDARDS

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## Climate Zone Map of India



## Overall Climate in India : Tropical

<b>Eastern India and Coastal Area</b>	Hot, tropical climate with all months above 18°C and a dry period in the winter
<b>Southern India</b>	Hot tropical climate with monsoon with temperature ranging from 18°C to 40°C.
<b>Central and Northwest India</b>	Dry and hot climate with extreme temperatures-summer go up to 40°C and winter temperature goes down to 3°C
<b>Northern mountainous areas</b>	Cold climate with warmest month at around 15°C.



**Traditional**

- In hot-dry and composite climates, buildings had thick mud or stone walls with roofs of mud and grass sandwiched between timber and terracotta tiles to keep the heat out.
- .....
- .....



**Modern**

- Practice of insulation (thermal as well as acoustic) is not predominantly used in residential sector.
- Some of the high end real estate developers (less than ...% of the residential market), insulate the roofs, outer walls and partitions, preferably with .....
- Real estate developers are decision makers for selection of the insulation material to be used in the construction depending .....
- .....

## Commercial

- Practice of insulation is prevalent in commercial construction mainly in hotels, hospitals and auditoriums, with different preferences for type of insulation material.
- Especially hotels and hospitals prefer to use .....
- .....
- .....

## Industrial

- In early 2000s, the awareness and usage for insulation in industrial construction was largely restricted to .....
- Since 5-7 years, there has been increase in awareness for insulation and it is mostly considered as energy saving tool for the industrial buildings.
- Industry players estimate the .....regions will witness more industrialization, thereby giving growth impetus to demand for insulation.
- .....
- .....

Following are the Government bodies which recommend and certify the insulation requirements:



Bureau of  
Energy  
Efficiency

- Bureau of Energy Efficiency (BEE) is an agency of Government of India, with the objective to .....
- .....



LEED

- Leadership in Energy & Environmental Design (LEED), is a .....
- .....



GRIHA

- Green Rating for Integrated Habitat (GRIHA) Council is founded by The Energy and Resources Institute, New Delhi and Ministry of Renewable Energy, to promote development of buildings and habitats in India.
- As per data published by GRIHA, around .....
- .....



# INSULATION MATERIALS MARKET IN INDIA

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## Market Size

- In 20XX, the insulation material market is estimated to be € .... mn and is projected to grow at....% per annum.
- There are several insulation material available in the market, out of which widely used are:
  - .....
  - .....
  - .....
- Developers are also looking at new technologies like ..... insulations.

## Glasswool

### International

- UP Twiga
- ...

## Rockwool

### International

- Rockwool India
- .....

### Indian

- .....
- .....
- .....
- .....

## Leading Players

- As per interviews of the industry players, ..... is the leading market player for glass wool.
- As per the information collected, the price offered by .... is competitivE.
- .....
- .....
- The total installed capacities of top 5-6 players:
  - Glasswool: .... tonnes
  - Rockwool: ..... tonnes

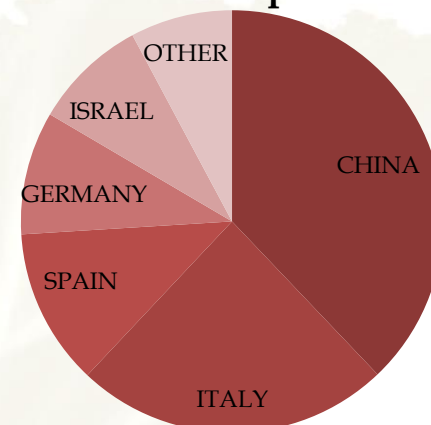
## Brief Profile of Leading Manufacturers

Company	Glasswool/Rockwool	Manufacturing Location	Prod. Capacity (MT)
..			
..			
..			
..			
..			
..			
..			
..			

## Glass wool

- In 20XX-XX, glasswool worth ....mn was imported in India as compared to € ... mn in 20XX-XX.
- China constitutes major part of the imports (...%) followed by ... (..%).
- .....

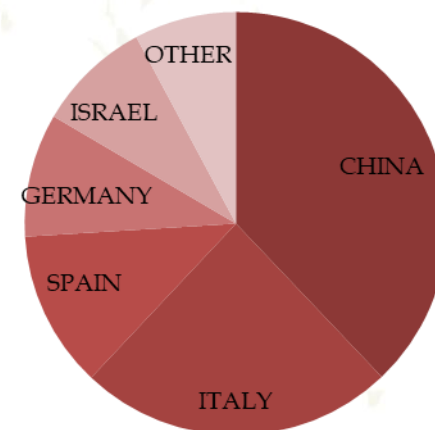
Glass wool Import 20XX-XX



## Rock wool

- The rockwool imports decreased from € ... mn in 20XX-XX to € ... mn in 20XX-XX.
- During April 20XX-Jan 20XX, the rockwool import stood at € ... mn.
- .... is the lead exporter of rock wool to India .....
- .....

Rock wool Import 20XX-XX



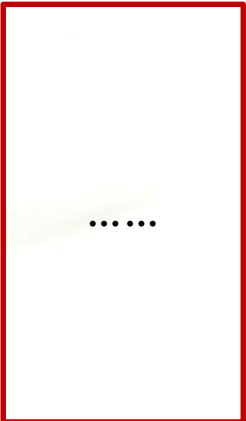
# **FEEDBACK OF LEADING GLASSWOOL AND ROCKWOOL MANUFACTURERS**

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We had discussion with industry players to understand about the market and the kind of machines used by them for manufacturing.



- .....
- .....



- .....
- .....

The most of the plants installed in India are combination of critical machines imported from ..... and allied machines manufactured in India.

### Glass wool Machinery

- € ... mn worth glasswool machinery was imported in India in 20XX-XX.
- The imports stood at € .... mn in 20XX-XX (Apr-Jan).
- .....

### Rock wool Machinery

- € ... mn worth rockwool machinery was imported in India in 20XX-XX as compared to € .. mn in 20XX-XX.
- The imports stood at € ... mn in 20XX-XX (Apr-Jan), almost double compared to previous year.
- China is the lead exporter of rock wool machinery, followed by ... (...%).

- Consists small unorganised players
- Located in industrial clusters of ..... region, e.g. ....
- .....

**For machinery and machine tools for glasswool and rockwool**

<b>PARTICULARS</b>	<b>RATE</b>	<b>EFFECTIVE RATE</b>
Assessable value (A)		100
Basic Duty(B) (A)* Basic Duty		
Preferential Duty (A) * Preferential Duty		
CVD Additional Duty (C) (A+B) * CVD Rate		
Central Excise Education Cess (D) (C) * Central Excise Education Cess		
Customs Education Cess (E) (B+C+D)* Customs Education Cess		
Special CVD (F) (A+B+C+D+E)* Special CVD		
Effective Custom Duty ( B+C+D+E+F)		