

Stay connected
with Indian Construction
Equipment (ICE) Industry

REPORT ON **ICE INDUSTRY** VISION 2020

To be Released in November 2015



**BOOK YOUR
ORDER NOW FOR
EARLY BIRD
DISCOUNT**



Presented by



Confederation of Indian Industry

iCEMA[®]
Indian Construction Equipment
Manufacturers' Association



REPORT ON ICE INDUSTRY VISION 2020

The Indian construction sector has seen extremely erratic growth patterns over the last 4 years. New project investments have been limited, Inventory of household dwellings is steadily building up, Infrastructure deficit continues to exist and absolute freeze in policy initiatives till 2013 has resulted in a consensually weak sentiment for the construction industry. Understandably these developments have had their impact on the construction equipment industry. It has been steadily contracting over the last 4 years.

However, there is a huge upside to Indian construction industry. The very reasons that saw its deceleration in the last 3-4 years indicate towards a huge opportunity for growth. India will need world class infrastructure to enhance its competitive advantage globally. India will require smart housing solutions that will balance the affordability and availability grid. India will require serious investments in power, transportation ,airports and ports to overcome its logistical challenges. Indian GDP will grow at precisely half the rate at which construction industry will grow. That puts a significant responsibility on the government of the day to encourage the construction sector.

The current NDA government has embarked on a new path and has set out some incremental initiatives that have seen about 89 projects worth Rs.190,000 crores cleared, road building that had fallen to an abysmal 4 km/day has risen to about 12km/day and could well reach 23km/day that it had achieved during the NDA 1 rule. These incremental steps are expected to lead into larger reforms and policy initiatives that will put construction and infrastructure onto a high growth orbit in a years' time.

In this backdrop it becomes increasingly important to understand the changing equations and the tipping point for from where an industry recovery and acceleration of contracted growth will start. It therefore becomes imperative to understand the role of key stakeholders of the industry and the planned course of action which would finally lead to the industry revival.

Fiscal year 2014-15 saw recommencement of coal mining with the re-auctioning of licenses. It also saw an improvement in roadbuilding activity as stated earlier. The government has also conceived initiatives like smart cities (100) and rapid urbanization programs, It has indicated ambitious investments in railways and for the first time initiated a public private initiative in the sector to modernize India's railway stations. The swachbharat campaign in India is attracting investments in improving sanitation in India .The river linking project in itself is a big opportunity for most construction equipments. Rs.70,000 crore of spending on ports has been announced. Real estate industry in tier 2 cities is maturing and there is a significant spurt in low cost housing. The government is also looking at rationalizing tax by bringing in the GST which could further contribute to development of the industry

All these sectors will contribute to driving growth in construction. However, there is enough opportunity to do more across other sectors of infrastructure. Government also has to loosen policy bottlenecks caused by taxation, duties and other levies that impact the sector directly.

From an industry perspective the numbers over these last 4-5 years have not been very



promising. The overall industry has seen a negative 4% growth in volumes since 2010. Some of the key equipment's like Backhoe Loaders, Excavators, Pick and Carry Cranes have shown a considerable fall in numbers. The year 2015 has been relatively better, the numbers look promising and the industry might see a positive growth of 10% in volumes.



Key report highlights

- State of the infrastructure industry
- Current Demand scenario of the ICE industry
- The critical issues faced by the ICE industry
- The future outlook (mid-term – 2020) and projected market size for equipment by 2020.
- Way forward on the critical issues

Key contributors to the report would be across various stakeholders

- Equipment OEM
- Component manufacturers
- Key customers of Equipment across segments like Road Construction, Real Estate, Mining, Power, Defense, Railways and Ports
- Equipment financing companies
- Respective Government bodies

Details that can be found in the report

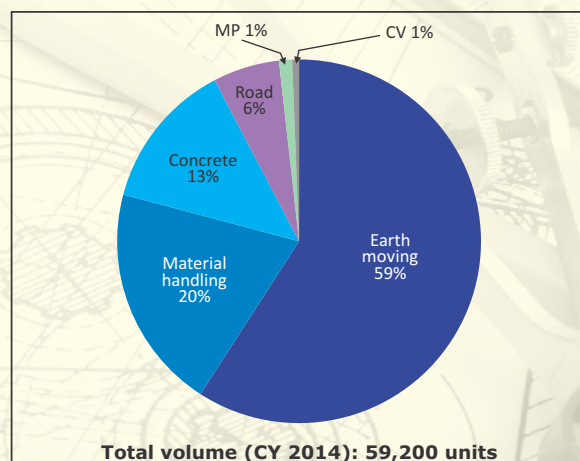
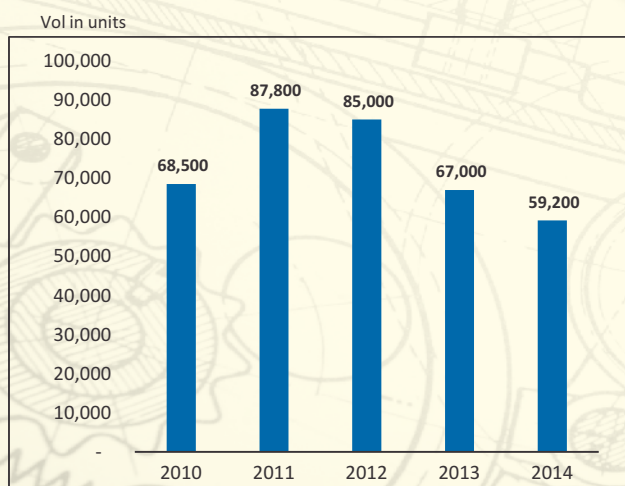
- Current construction activity across various segments of interest
- Investments in construction and infrastructure by Government and private players
- Impact of government policies now and over the foreseeable future
- Review of the current ECE industry

- The performance of the component Industry
- Business performance of various stakeholders during the last 2-3 years
- Opportunities and challenges faced by the ECE industry. Key growth drivers
- Impact of current government initiatives to boost the infrastructure segment
- Demand projection by key segments like Road Construction, Real Estate, Mining, Power, Defense, Railways and Ports
- Potential for used and rental equipment. Export potential for equipment
- Industry recommendations for development of the ECE industry and its eco system

Who could benefit from the report

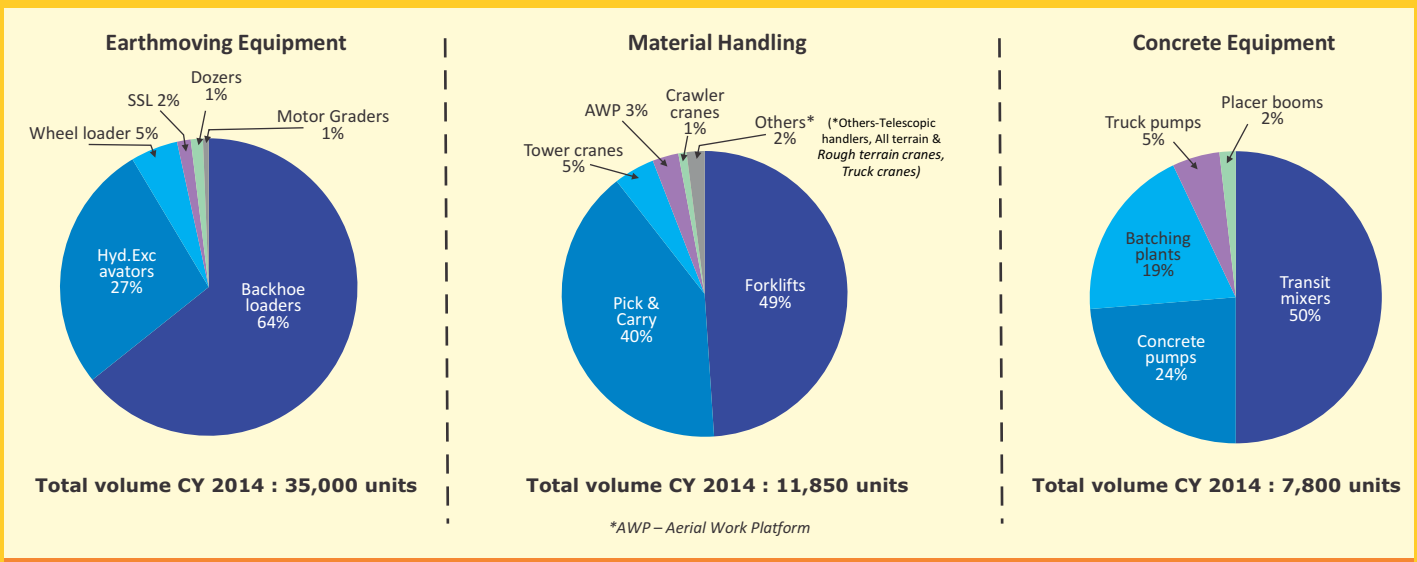
- Infrastructure industry
- Equipment manufacturers
- Component manufacturers
- Real Estate industry
- Contractors
- Research organizations
- Consultants
- Industry related publications
- Mining companies
- Equipment financing companies

Construction equipment industry



CY 2014 : Jan 2014 to Dec 2014

Market by Equipment segment



Report pricing

	Published Rate in INR	Discount Applicable	Net payable	Published rate in USD	Discount Applicable	Net payable
For iCEMA members	Rs. 100,000	50%	Rs. 50,000	\$ 1500	50%	\$750
For non-iCEMA Members	Rs. 100,000	40%	Rs. 60,000	\$ 1500	40%	\$900

Avail early bird pricing if your order & full payment is received on or before 29th November 2015.
Report copy will be couriered to the buyer after it is officially released at EXCON 2015

The above rate is subject to Service Tax or VAT if applicable.

Making The Payment

Payment in Indian Rupees (INR): We accept Cheque / Demand Draft or payment through RTGS.

Our bank details are given below:

Account Name	Indian Construction Equipment Manufacturers Association
Bank Name	HDFC Bank Ltd
Bank Branch	Jorbagh Market, New Delhi 110003
Account No.	06171110000035
RTGS / NEFT IFSC Code	HDFC0000617

All the Cheques / Drafts should be drawn in favour of **Indian Construction Equipment Manufacturers Association**, payable at New Delhi.

For further details, please contact:

Mr. S G Roy, Secretary
Indian Construction Equipment Manufacturers' Association
The Mantosh Sondhi Centre
23, Institutional Area, Lodi Road, New Delhi 110003
Phone: 011- 24682229 • **Mobile:** 9871371516
Email: s.g.roy@cii.in