



Indian Construction Equipment Manufacturers' Association

Activity Report 2013-15

The First Annual General Meeting of ICEMA was held on 9th May 2013 at New Delhi, Mr. Amit Gossain, Executive Vice President, JCB India Ltd. took over as the President of the Association for the period 2013-15. Mr. Anand Sundaresan, Vice Chairman & Managing Director, Schwing Stetter India Pvt. Ltd. took over as Vice President of ICEMA.

During the period 2013-14, following Panels were constituted with the objectives to deal with specific areas of work:

- Industry Government Interface Panel
- Technical Panel
- Skill Development Panel
- Market Data & Statistics Panel
- Membership Panel
- Promotion Panel
- EXCON Conference Panel
- bC India Conference Panel
- Budget & Taxation Panel -
- Finance Panel

These panels have been very active during the year 2013-15 in their respective work areas.

Industry Government Interface Panel

The Panel mainly focused on policy related issues of the Government. Industry issues were taken up with the various Government departments from time to time. Some of the major initiatives of the Panels are given below:

ICEMA's recommendations for correcting the list of duty exempted road construction equipment / machinery were accepted by the Government. In this connection, several meetings were held with the Ministry of Finance and Department of Heavy Industry. The Panel continued to interact with the Government for further correction to the list of duty exempted items,.

ICEMA had a series of meetings with Secretary, Joint Secretaries and senior officials of Department of Heavy Industry on a regular basis to discuss on key issues of concern of the industry. ICEMA's recommendation for setting up an independent Test Centre was approved by the Government. The entire funding for the project would be met by the Government. Several other issues of the Industry were taken up with the Government at the highest level.

Office bearers of ICEMA had meetings with senior officials of Ministry of Road Transport & Highways and Ministry of Rural Development and NRRDA to discuss on various road projects undertaken by the Government for highway development and rural connectivity. ICEMA has been interacting very closely with the National Rural Roads Development Authority (NRRDA) to discuss on the applications of appropriate technology and equipment in the rural road project. In this connection, it has been decided to organize 4 regional conferences and one National Conference on Rural Road Projects.

Industry Government Interface Panel reviewed the tariff related issues of industry from time to time and took up the same with the Government Department concerned. The Panel coordinated with the Budget & Taxation Panel in formulating Industry

recommendations for the Union Budget and submitted the same to the Government. Pre-budget memorandum were submitted for the year 2013 and 2014.

The Government Interface Panel convened by Mr. Vikram Sharma has been proactively taking up issues with Government which has resulted in fostering a growing recognition for ICEMA within relevant Government Departments.

Technical Panel

The major initiatives of the Panel were to have close interaction with the Department of Heavy Industry and other concerned organizations for setting up an independent Test and Certification Centre for the construction equipment industry. In this connection, ICEMA had a series of meetings with the Government and other concerned organizations. Detailed feasibility report for setting up a test centre was submitted to Department of Heavy Industry. ICEMA Technical Panel also made a presentation to DHI highlighting the outline of the draft proposal for the CEMM Act which would take care of the regulations for the off-highway equipment. Government has advised ICEMA to prepare a detailed project report (DPR) for the proposed test centre and to submit the same to the Government by 31st March 2016.

ICEMA is in the process of developing a separate Act (similar to CMVR) for the off-highway equipment. The draft Act would be submitted to the Government by 31st December 2015.

Technical Panel had a series of meetings within the ICEMA membership and also with ARAI and Indian Diesel Engine Manufacturers Association (IDEMA) to review the existing emission norms and to take a stand on the timeline for next stage of emission norms (Bharat Stage IV) for the construction equipment industry.

The Panel had meetings with the Joint Secretary, Ministry of Road Transport & Highways to discuss on the various technical matters, emission norms, etc.

Skill Development Panel

This Panel was actively involved for setting up of Sector Skill Council for Construction Equipment industry.

ICEMA's proposal for setting up Sector Skill Council for construction equipment industry has been approved by the National Skill Development Corporation (NSDC). The Council has been renamed as INFRASTRUCTURE EQUIPMENT SKILL COUNCIL (IESC). The IESC has been registered under Societies Registration Act XXI of 1860. Memorandum & Rules of IESC has also been registered.

Governing Body of the Council includes representatives from Equipment manufacturers, Construction companies / Associations, Department of Heavy Industry, Academia and National Skill Development Corporation. Mr. Glenville da Silva is the Chairman of the Council and Mr. Vikram Sharma - the Co-Chairman. Mr. H S Mohan has joined as CEO. The Council has opened their office at Bangalore.

Market Data & Statistics Panel

The Panel worked closely with the members on a regular basis for collecting sales data. From October 2013, sales data are being collected on monthly basis in addition to quarterly and Annual Updates. Monthly industry updates are also being released regularly.

The Market Data & Statistics Panel convened by Mr. Vivek Anand had created a more meaningful reporting format which has been successful to a very large extent to demonstrate to members the importance & relevance of data sharing which helps the industry as a whole.

Online data management system was launched in November 2013 for posting sales data to the ICEMA website through given users id and password. All the members are now posting their monthly sales data to the website. The quality of monthly and quarterly industry updates released by ICEMA has been substantially improved. Almost all the members (OEMs) are providing data through online.

Membership Panel

During the course of last two years, following companies have taken up membership with ICEMA:

- (a) Mahindra & Mahindra Limited
- (b) Ajax Fiori Engineering (I) Pvt Ltd.
- (c) Amman Apollo (I) Pvt. Ltd.
- (d) Spartan Engineering
- (e) Nakoda Machinery Pvt. Ltd.
- (f) Bonfiglioli Transmissions Pvt. Ltd.
- (g) Carraro India Pvt. Ltd.
- (h) ICICI Bank
- (i) Yanmar India
- (j) Herrenknecht India Pvt. Ltd.

The total membership strength is now 58 which includes 42 Primary Members and 16 Associate Members.

Membership Panel also introduced a new concept of displaying a board "MEMBER ICEMA" at the entrance of their stalls at EXCON and bC India exhibitions. This was found very useful in terms of promoting ICEMA brand and generating membership enquiry. Many non-members indicated their interest to join ICEMA after the EXCON.

Membership Panel made substantial efforts in expanding membership strength of the association.

Promotion Panel

The Promotion Panel brought out the new brochure of ICEMA which give detailed information of the product range of member companies. The brochure is being displayed in all the major exhibitions such as Bauma Munich, Conexpo (Las Vegas), EXCON and bC India.

The Panel also created new promotional posters of ICEMA. These posters were displayed at the ICEMA stalls at various exhibitions.

Conference Panel

Conference Panel coordinated the major conferences organized by ICEMA from time to time at various locations. During the course of last two years, ICEMA organized conferences during EXCON, bC India and ConMac. ICEMA also organized a National Conference on Rural Roads during August 2014 at New Delhi.

ICEMA organized a Conference on Infrastructure Equipment - Re-Scripting the Growth Story on 16th December 2014 at Greater Noida. This conference was organized concurrently with bC India Expo.

Budget & Taxation Panel

The Panel convened by Mr. Arvind Garg had a series of meetings to review the points and suggestions received from member companies with regard to recommendations for the Union Budget. The Panel prepared the draft ICEMA pre-budget memorandum and submitted the same to Industry – Government

Interface Panel. The memorandum was finally cleared by the Governing Council for submitting the same to the Government.

Budget & Taxation Panel has been engaged in reviewing the tariff related issues and suggesting industry view points and recommendations.

The Panel also interacted with the Department of Heavy Industry and submitted its Pre-Budget Memorandum with the request to take up the same with the Ministry of Finance.

bC India Conference Panel

The Panel organized a Conference on Infrastructure Equipment – Re-scripting the Growth Story on 16th December 2014 at India Expo Centre & Mart, Greater Noida. This Conference was organized concurrently with bC India Exhibition.

Conference Panel was headed by Mr. Anand Sundaresan. Over 270 delegates participated in the conference. AT Kearney was the Knowledge Partner for the event.

EXCON 2013 & ICEMA Conference

ICEMA was the Sector partner and was actively involved in EXCON 2013. Several ICEMA members were on the Steering Committee of EXCON 2013 and actively contributed to the successful staging of the largest Exhibition on Construction Equipment & Construction Technology in India. ICEMA members were the main Exhibitors at the event. ICEMA President addressed the gathering at the EXCON Inaugural Ceremony.

Coinciding with EXCON 2013, a two-day Conference on Sustainable Infrastructure Development was organized on 21-22 November 2013 at Bangalore. The conference focused on key infrastructure projects in the country, present trends and

implementation status, opportunities for construction equipment manufacturers, policy initiatives of the Government for accelerating implementation of stalled projects, role of banks and financial institutions for equipment financing / renting, training & skilled manpower etc. The conference was inaugurated by Dr. E M Sudarsana, Natchiappan, Minister of State for Commerce & Industry, Government of India. The conference was attended by over 275 participants. AT Kearney was the Knowledge Partner for this conference.

Finance Panel

Finance Panel was set up in November 2014 under the convenorship of Mr. D K Vyas. The main focus of the Panel is to review the issues of concern being faced in Equipment Financing and to take up the same with the Government / concerned authorities. The Panel has submitted a representation to RBI / Ministry of Finance highlighting the issues of concern and requested for special treatment to financing of construction equipment which are used in building infrastructure.

Interaction with CEMA and KOCEMA

ICEMA organized meetings with Korean Construction Equipment Manufacturers' Association (KOCEMA) and Japan Construction Equipment Manufacturers' Association (CEMA) during EXCON 2013 at Bangalore. Meeting with Korean delegation mainly discussed on the cooperation between India and Korea on strengthening partnership between the two associations in terms of sending delegation and sharing of information. It was agreed that ICEMA would be taking part in Conex Korea exhibition in September 2014. ICEMA would also make a presentation on Indian Construction Equipment Industry at the India Seminar at Conex Korea.

The Meeting with CEMA mainly discussed on the activities of both the associations and how best they can co-operate with each other for mutual benefit.

Mr. Karasawa of CEMA made a presentation highlighting the organization structure of CEMA, membership strength with product range, various committees, gross domestic production year wise and exports, product wise sales, etc.

ICEMA – AT Kearney Report

During the Conference on Sustainable Infrastructure Development held on 21-22 November 2013 during EXCON, a Report on “Realizing ECE Industry’s Long Term Potential” was released by ICEMA – AT Kearney. The report was formally released by Dr. E M Sudarsana, Natchiappan, Minister of State for Commerce & Industry, Government of India at the ICEMA Conference.

The report mainly covered the issues that the ECE industry faces as bottlenecks to realizing its long term potential – both in terms of the demand side, as well as in supporting areas of its ecosystem. The report also explores some of the potential best practices from other parts of the developing world that India could draw upon, apart from expanding the scope of some of the best practices being followed in small pockets within India itself.

ICEMA Conference on Rural Roads

ICEMA, in collaboration with the Ministry of Rural Development, organized a National Conference on Rural Roads on 26th August 2014 in New Delhi. Shri Upendra Kushwaha, Minister of State for Rural Development was the chief guest at the conference.

Shri Rajesh Bhushan, Joint Secretary of Ministry of Rural Development & Director General, NRRDA, Shri N.C Solanki, Director (Projects-I, National Rural Road Development Agency (NRRDA), and Dr. K Pateriya, Director (Technical), National Rural Road Development Agency (NRRDA) marked their presence in the conference.

The conference mainly focused on the scope of expansion in the rural road network and challenges faced by the industry. Shri Upendra Kushwaha, in his speech, mentioned that lot of initiatives have been taken by the Government and National Rural Road Development Agency since 2000 for building rural roads under PMGSY scheme. It is important that a coordinated approach is adopted for building quality roads in villages. Apart from road construction, he also focused on sanitation as a must in rural areas.

The conference had recommended that ICEMA, in collaboration with the Ministry of Rural Development, would organize a series of regional conferences which would focus on state of the art technology and equipment for construction of rural roads. The conference was attended by over 300 participants.

ICEMA's Participation in CONEXPO CON/AGG, Las Vegas

An 8-member ICEMA delegation visited CONEXPO CON/AGG, an international exhibition on construction equipment which was held in Las Vegas, USA between 4th and 8th March, 2014. CONEXPO-CON/AGG is an international exhibition showcasing latest innovation and technology on the entire spectrum of construction equipments, material handling equipments and road planning equipments. Around 2,400 exhibitors from worldwide showcased more than 1,000 new products and services across major construction industry.

The ICEMA delegation had the opportunity to meet the senior officials of Association of Equipment (AEM), the organizers of the show which led to useful exchange of information. AEM was keen to collaborate with ICEMA on various fronts.

Mr. Amit Gossain, President, ICEMA made a presentation on the "Emerging Market Session in India" and highlighted on the enormous growth potential in the Indian Economy and the issues and challenges faced by the infrastructure and construction equipment sector in India. The session was attended by exhibitors, contractors and distributors apart from members of the Indian delegation.

ICEMA had a stall at CONEXPO which mainly displayed promotional posters on Indian Construction equipment industry and activities of the association.

bC India Expo and ICEMA Conference

ICEMA took part in bC India Expo which was held during 15-18 December 2014 at Greater Noida. ICEMA stall displayed promotional posters, members' logo and association's brochures.

Coinciding with bC India 2014, ICEMA organized a full-day Conference on Infrastructure Equipment - Re-scripting the Growth Story on 16th December 2014 at India Expo Centre, Greater Noida. The Conference was inaugurated by Mr. S N Das, Director General (Road Development) & Special Secretary, Ministry of Road Transport & Highways, Government of India. The conference mainly deliberated on infrastructure development - present scenario & challenges; speed and scale of project implementation; innovative model of building sustainable infrastructure; perspective of the government and regulatory bodies; human resources & skill development; viable financing model for the equipment and projects, leasing and renting of equipments.

The conference was attended by over 280 participants.

ICEMA's Participation in Conex Korea

Conex Korea 2014 - an international exhibition on construction equipment & technology was held in Seoul, South Korea from 24th to 27th September 2014. Coinciding with Conex Korea 2014, Korean Construction Equipment Manufacturers Association (KOCEMA) organised a Seminar on India on 25th September. ICEMA was invited to take part in the Seminar and to make a presentation on Indian Construction Equipment Industry & Emerging Market in India. ICEMA made a

detailed presentation on Indian Construction equipment industry, present trends, growth prospects, upcoming projects & construction equipment market in India.

The presentation was well received by the participants and a lot of questions were raised on upcoming projects in India and construction equipment market. The Seminar was attended by over 120 participants from construction equipment industry, construction companies, consultants and international visitors.

ICEMA representatives had a meeting with Mr. Sung-OK Lee, Executive Vice Chairman, KOCEMA to discuss on possible areas of cooperation between India and Korea.

KOCEMA also organized a Gala Dinner on 25th September which was attended by over 100 overseas visitors including Indian delegation. Delegations from overseas industry associations also joined the Gala Dinner.

International Associations Committee (IAC)

International Associations Committee (IAC) represents all the leading Construction equipment manufacturers associations such as CEMA (Japan), KOCEMA (Korea), CECE (Europe), AEM (USA), CCMA (China) and ICEMA (India). IAC has been actively involved in bringing out demand projection survey from time to time and circulate the same among their members. Each Association collects inputs from their respective members and brings out the survey. ICEMA also brings out the survey on demand projection on the basis of inputs received member companies. ICEMA representatives attended the IAC meetings held in Munich, Las Vegas, Shanghai and Paris. IAC meetings mainly discuss on the survey results and association's views and comments on the business scenario world wide and possible areas of cooperation among the industry associations.

ConMac 2015 and ICEMA Conference

ICEMA organised a Conference on Infrastructure Development in North East Region on 28th February 2015 at Guwahati. The Conference was organised concurrently with ConMac 2015 - an exhibition on construction equipment and technology. The conference mainly focused on present status and future plan on roads, highways and Infrastructure development in North East region, requirement of specific equipment for these projects, skill & manpower training and financing & leasing of equipment.

The Conference was inaugurated by Maj Gen U S Dadu, Additional Director General, Border Roads Organization. In his inaugural address, Maj Gen Dadu highlighted on road development projects in North East Region undertaken by the Border Roads Organization and mentioned that the region needs special focus on creating infrastructure especially construction of roads & highways in the border areas.

Maj Gen Dadu also mentioned that huge amount of work is to be done in the North East which is possible only by large scale mechanization and infusion of technology. This would require adequate skill manpower in the region and appropriate technology. ICEMA could play an important role in skill development and supply of appropriate equipment suitable for North East projects.

Mr. Naveen Kumar, Director, Border Roads Organization made a detailed presentation on the various road projects in North East which cover approx. 13,000 km of roads. A detailed presentation on Special Accelerated Road Development Programme in North East (SARDP-NE) was made by Mr. Sudip Chaudhury, Superintending Engineer, Ministry of Road Transport & Highways. Ms. G Baishya, General Manager, Assam Industrial Development Corporation highlighted Assam Government's initiatives towards high standard industrial infrastructure development at various locations in the state.

Conference on Highway Equipment

ICEMA and Indian Academy of Highway Engineers (IAHE), with the support of Ministry of Road Transport & Highways, are jointly organized a two-day National Conference on Highway Equipment on 9-10 July 2015 at New Delhi. Mr. Nitin Gadkari, Hon'ble Minister of Road Transport & Highways was the Chief Guest. The Conference mainly focussed on issues like potential and prospects, performance and productivity, energy and environment, skill and safety, IT integration, financing and leasing, etc relating to Highway Equipment. The conference provided a platform to discuss and exchange views and show the way forward for adopting innovative technology and best practices in developing world class highway network in the country.

The Conference was attended by over 400 participants from Central & State Government and Industry.

ICEMA Members

(as on July 2015)

Ajax Fiori Engineering (India) Pvt. Ltd.
AKG India Pvt Ltd
Ammann Apollo India Pvt. Ltd.
Aquarius Engineers Pvt. Ltd.
Ashok Leyland John Deere Pvt. Ltd.
Atlas Copco India Ltd.
BKT Ltd.
Bharat Earth Movers Ltd.
Bonfiglioli Transmission Pvt. Ltd.
Carraro India Pvt. Ltd.
Case New Holland Construction Equipment (India) Pvt. Ltd.
Caterpillar India Pvt Ltd.
Chowgule & Co. Pvt. Ltd.
Doosan Infracore Construction Equipment
Eaton Technologies Pvt. Ltd.
Eimco Elecon (India) Ltd
Escorts Construction Equipment Ltd.
Fleetguard Filters Pvt. Ltd.
Gates India Pvt. Ltd.
Gmmco Ltd.
Greaves Cotton Ltd.
Herrenknecht India Pvt. Ltd.
Hyundai Construction Equipment India Pvt. Ltd.
ICICI Bank Ltd.
JCB India Ltd.
Kobelco Construction Equipment Pvt. Ltd.
Kobelco Cranes India Pvt. Ltd.

Komatsu India Pvt. Ltd.
Kotak Mahindra Bank Ltd.
L&T Finance Ltd.
Larsen & Toubro Ltd.
Leeboy India Construction Equipment Pvt. Ltd
LiuGong India Pvt. Ltd.
Nakoda Machinery Pvt. Ltd.
Mahindra & Mahindra
Metso Minerals (India) Pvt. Ltd.
MTU India Pvt. Ltd.
Nawa Engineers & Consultants Pvt. Ltd.
Potain India Pvt. Ltd.
Putzmeister Concrete Machines Pvt. Ltd.
Puzzolona Machinery Fabricator
Sandvik Asia Pvt. Ltd.
Sany Heavy Industry India Pvt. Ltd.
Schwing Stetter India Pvt. Ltd.
SREI Equipment Finance Pvt Ltd.
Spartan Engineering Industries Pvt. Ltd.
Tadano India Pvt. Ltd.
Tata Capital Financial Services Ltd.
Tata Hitachi Construction Machinery Ltd.
Terex India Pvt. Ltd.
TIL Ltd.
Universal Construction Machinery & Equipment Ltd.
Voltas Ltd.
Volvo India Pvt. Ltd.
Veena Industries Ltd.
Wipro Infrastructure Engineering
Wirtgen India Pvt. Ltd.
Yanmar India Pvt. Ltd.

