



INDIA

STATUS SUMMARY FOR THE FLUID POWER SUMMIT

LAS VEGAS

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Fluid Power Society of India

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INDIA





India at a glance

Area	: 3.29 Million km ²
Population	: 1.32 Billion
GDP	: > 2 Trillion US \$
Growth in GDP 2016	: 6.5 to 7.0%
Growth in GDP 2017	: 7.0 to 7.5% (Expected)

Opportunity:

India is one of the fastest growing large economies. Heavy impetus by the Government on infrastructure spending provides great opportunity for Fluid Power companies.

Current government has created a new initiative called “Make in India”, urging manufacturing organisations to setup units in India, by easing the procedural requirements and improving transparency.

Focused effort by the government on “Make in India” campaign in the sectors of Aerospace and Defence, by enforcing manufacturers, selling to Indian armed forces/aerospace companies, to procure at least 30% of sub-parts from Indian suppliers.



The FLUID POWER market in India

Exact figures are not available but our assessment is that the total size of the market is between 1 billion and 1.1 billion US \$.

Fluid Power industry is expected to grow at 9-11% for calendar year 2017. This is a similar figure to what has been seen in calendar year 2016.

A growth rate of 10 – 15% per annum in the next few years is quite likely.

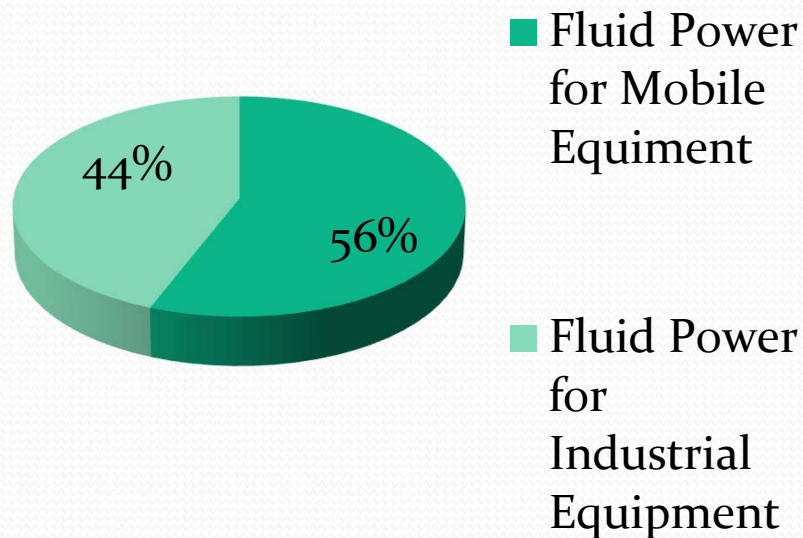
The nature of growth may have the following characteristics

- (a) A large volume increase in mobile hydraulics (>15%)**
- (b) More sophistication in pneumatics / electronics / mechatronics in manufacturing.**

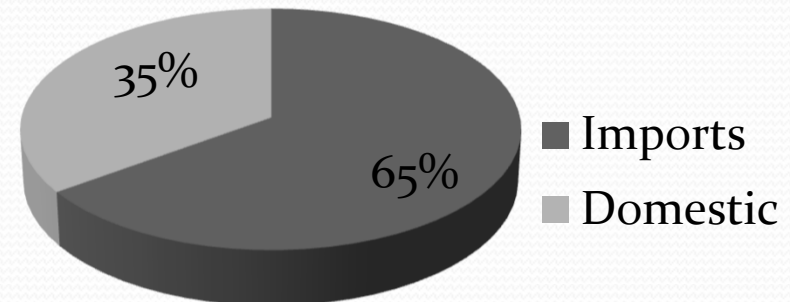


Categorization of the 1.1 billion US \$ Fluid Power market

Sectoral Demand for Fluid Power



Supply to cater to Fluid Power Demand





Global Fluid Power players already in India

Bosh Rexroth	Hydac
Parker	HAWE
Danfoss	Husco
Eaton	Kawasaki-Wipro
Yuken	Argo Hytos
Walvoil	Festo

There are several Indian companies which have been very successful. However, two of them have done exceptionally well.

Wipro

Wipro with manufacturing facilities in India, Europe, Brazil and China has emerged as the largest manufacturer of mobile hydraulic cylinders in the world.

Dynamatic Technologies

One of the largest players in the world in gear pumps with plants in India and Europe.



Potential of Indian market for global companies

- FDI in India has been growing rapidly
 - 2013 - \$ 28 billion;
 - 2015 - \$ 31 billion;
 - 2016 - \$ 37 billion; (Estimated figures)
- “Make in India” campaign has had a positive impact on FDI in India.
- Government has announced targeted investment of \$ 375 billion in infrastructure over the next 3 years.
- Indian government has cleared 100% FDI in infrastructure and railways.



We invite you to consider the
opportunities in India