

ENGINEERING EXPORTS AT RECORD HIGH IN 2024-25

Indian Engineering Exports ^{Rs150}

ie | Magazine of EEPC INDIA (formerly Engineering Export Promotion Council)

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VOL. 18, ISSUE NO. 1, APRIL 2025

**EEPC INDIA AT
LEADING
WORLD
TRADE
FAIRS**

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EXCLUSIVE MEMBER SECTION AT

www.eepcindia.org

An exclusive member's section has been introduced on EEPC India's website. The User ID and Password has been sent to members on their email ID that is on record with EEPC India. If any member has not received it, please contact EEPC India at: eepcho@eepcindia.net.

The email IDs of some members are not available with EEPC India. Please provide your email ID at eepcho@eepcindia.net so that we can mail the details to you. It is also recommended that all members view their details in the Member's Directory on EEPC India's website and verify their email ID.

All members are also requested to provide mobile numbers of key contact persons over email. This will enable EEPC India to send important alerts and messages on SMS.

LETTER BOX

'THANK YOU' NOTE

With reference to our email dated 06.10.2024 we wish to inform you that because of your support and help we have received the balance 100% payments from our Overseas Customer. We hereby officially confirm that we have received full and final payments and the Order stands executed in all aspects.

Once again we wish to express our sincere thanks to you and the entire team of EEPC for such wonderful support and cooperation in the matter.

Please do let us know if we can be of any help and we shall be happy to assist.

Thanks & Best regards
Alok Dubey - Project Lead

THANK YOU EEPC INDIA

The newly designed event pages are welcome. EEPC India's multiple events across the globe are eye openers and their reports help everyone to understand what is going on across the globe. Such events and their publicity are much needed for a direct customer-buyer interface and interaction. Thank you EEPC India for orchestrating such thought-provoking events.

Thank you
Malini Bhasin

NOTIFICATIONS

1. As per DGFT Public Notice No. 50/2024-25 dated 10th March 2025, the Directorate General of Foreign Trade (DGFT) amended Paragraph 10.12(D) of the Handbook of Procedures (HBP) 2023,

revising the procedure for the General Authorization for Export after Repair (GAER). This amendment streamlines the re-export process of imported SCOMET items after repair in India, allowing for a one-time GAER valid for one year with quarterly post-reporting.

2. As per Trade Notice No. 33/2024-25 dated 12th March 2025, the Directorate General of Foreign Trade (DGFT) has invited inputs on the draft amendments in the procedure for Export Authorization for "Stock and Sale" of SCOMET items. This notice aims to streamline the export process for sensitive items by ensuring compliance with international regulations and enhancing the efficiency of authorization procedures.
3. As per Public Notice No. 51/2024-25 dated 19th March 2025, the Directorate General of Foreign Trade (DGFT) has extended the deadline for filing the Annual RoDTEP Return (ARR) for the financial year 2023-24. The new deadline is now June 30, 2025, with a grace period extended until September 30, 2025.
4. As per Trade Notice No. 34/2024-25 dated 20th March 2025, the Directorate General of Foreign Trade (DGFT) has announced a review of the Standard Input Output Norms (SIONs) pertaining to automobile tyres. This review aims to update and streamline the norms to better reflect current industry practices and technological advancements.
5. As per Trade Notice No. 35/2024-25 dated 25th March 2025, the Directorate General of Foreign Trade (DGFT) has sought comments on a proposal to make GST E-Invoices received through the GSTN to the DGFT BO portal mandatory for claiming Deemed Export Benefits under the Foreign Trade Policy (FTP). This proposal is pursuant to the provisions of Paragraphs 1.07A and 1.07B of FTP 2023.



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PANKAJ CHADHA
CHAIRMAN

From the Chairman's Desk

As we enter a new financial year, the global trade is undergoing significant disruptions. The prime reasons has been the announcement of US president Donald Trump's "Liberation Day Tariff" which has already sparked retaliatory measures from other countries and concerns about global economic stability. The WTO has already sounded caution - according to them under the current conditions the volume of global merchandise trade is likely to fall by 0.2 percent in 2025. The organisation has further added that although the temporary pause may arrest some trade contraction, there are significant downside risks including retaliation by other countries and policy uncertainty which may further impact global trade volume by around 1.5%, particularly hurting the export-oriented least developed countries. The tariffs are a new addition to the list of trade disruptions that have been ongoing in the recent years including global conflicts and rise of protectionism. In this backdrop, how is India's engineering export community performance?

I am glad to mention here that the last fiscal (FY 2024-25) has been positive for the Indian engineering exports. As per the latest Quick Estimate figures published by the Government of India, engineering exports in FY 2024-25 recorded a growth rate of 6.7 percent on a y-o-y basis to reach an all-time high figure of USD 116.7 billion. The growth achieved by the engineering exports is higher than that of the merchandise exports which recorded a y-o-y growth of 0.08 percent. The share of engineering sector in India's total merchandise exports also reached 26.7 percent. While this is a commendable performance, the Indian engineering sector needs to prepare for the continually changing and uncertain global trade dynamics. For instance, we are well aware that US is the largest export partner for India engineering sector accounting for around 16 to 17 percent of India's engineering exports. The retaliatory tariffs in addition to the Section 232 tariff and the tariff on automobile and auto components exports applied by the US will definitely have some implications for the India's engineering sector.

In this situation it is important for the government and the industry to adopt strategies that will help us mitigate the issue to our advantage. It is worth mentioning here that the Government of India has already undertaken the strategy to negotiate a bilateral trade deal with the US to lessen the impact of the reciprocal and other tariffs on India's exports to the US. Prior to the start of the negotiations, the two partners published an India-US Joint Statement wherein the two sides agreed to expand bilat-

eral trade to reach USD 500 Billion by 2030, including through the conclusion of a trade agreement. This is an important step towards consolidating and protecting our market in the US. EEPC India is also taking initiative to maintain India's position in the US market. Simultaneous to advising the government on trade policy, it is also taking delegation to International Fastener Expo of 2025 happening in Las Vegas, USA in September this year.

Simultaneous to protecting our existing markets, it is also essential for us to diversify our export destinations. This will help us lessen our overdependence on markets such as US and EU countries which are becoming increasingly protective in the recent times. With that objective in mind, EEPC India is gearing up to participate in some of the major engineering shows worldwide. The first one is, EXPOMAFE is happening in Brazil between 6th and 10th May covering areas such as hand tools, machine tools and industrial automation. It is one of the largest shows in Latin America and Brazil is one of our major partners in the Latin America. Therefore, participation in this exhibition improves our prospects in the Latin American market.

EEPC India will also be participating at MACH & TOOLS, SAUDI& GULF 4P happening in Saudi Arabia in December this year. Saudi Arabia and the Gulf Cooperation Council (GCC) holds significance as India's export destinations. Both UAE and Saudi Arabia feature in the top three export destinations for Indian engineering products. Hence participation in this event is expected to help us expand our footprint in the GCC region. Besides the above mentioned shows, EEPC India is also taking a multi-product trade delegation to Istanbul, Turkey as the country is gradually emerging as a preferred export destination for Indian engineering sector.

Finally I would like to thank the Government of India and the Department of Commerce for their continuous support. Also, as trade diversification becomes important, attending global trade expos is also essential especially for the Indian MSMEs. Financial assistance by the government is key to helping them in attending these expos. In the end I also urge my fellow exporters to participate in their preferred events and exhibitions to showcase their products in the global market.

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SPOTLIGHT

**EEPC INDIA AT LEADING HAND TOOLS, MACHINE TOOLS, FASTENERS
& INDUSTRIAL AUTOMATION TRADE FAIRS OF THE WORLD**

EEPC INDIA AT EXPOMAFE

06 - 10 MAY 2025 | SAO PAULO, BRAZIL



HIGHLIGHTS

- Expomafe is the leading tools and fasteners show of the world and its 4th edition will be held in Sao Paulo, Brazil between 6-10 May, 2025
- Brazil is topmost destination for India's engineering exports in Latin America

EXPOMAFE, the International Fair of Machine Tools and Industrial Automation, is one of the largest events in Latin America. The 4th edition of EXPOMAFE will be spread across 70,000m² of exhibition space. EXPOMAFE 2025 promises to exceed all expectations, with expanded exhibition space, state-of-the-art technology and diverse portfolio of exhibitors. The event serves as an exceptional platform to connect with leaders in the sector, explore new technologies, innovative solutions, and extend contact network. Additionally, it offers a comprehensive program of seminars, workshops and technical presentations conducted by industry experts, allowing for updates on advancement in Industry 4.0, automation, and additive manufacturing. The fourth edition of the event will bring together more than 65,000 visiting buyers from small, medium and large industries

HIGHLIGHTS OF EXPOMAFE 2023

The 3rd edition of the fair was held at the São Paulo Expo, the most modern exhibition pavilion in Latin America. The event showcased the latest technology, presented for the first time to the market by over 900 major brands from the entire machine tool and industrial automation industry. Over 55,000 buyers attended the show.

ECONOMIC SCENARIO OF BRAZIL

Brazil is the world's fifth-largest country and Latin America's largest economy. Brazilian economy has been experiencing a slow but steady recovery after the Pandemic. Real GDP growth was witnessed at 2.8%, in 2022 and 2.9% in 2023 mainly driven by solid consumption,

sustained by a robust labour market, and fiscal transfers. Brazilian economy is projected to grow at a 2.8% in 2024 and then moderated to 2.2% in 2025. The economy is projected to converge to 2.3 percent in the medium term, reflecting the effect of the past and ongoing structural reforms.

Brazil is a large middle-income country that aspires to become a strong leader of the global South. Brazil has abundant natural resources and a relatively diversified economy. The country is the world's largest producer of coffee, sugar cane and oranges, and is one of the world's largest producers of soya. With forests covering half of the country and being home to the world's largest rain forest, Brazil is the world's fourth largest exporter of timber. It also has a large industrial power, and has benefited greatly from its mineral ore wealth. The country is the world's second largest exporter of iron, and one of the world's main producers of aluminium and coal. As an oil producer, Brazil is aiming to become energy independent in the near future, with reserves that could make it one of the top five oil producers in the world. Furthermore, the country is increasingly asserting itself in the textile, aeronautics, pharmaceutical, automobile, steel and chemical industry sectors. Many of the world's large automobile manufacturers have set up production plants in Brazil.

BILATERAL TRADE BETWEEN INDIA AND BRAZIL

Brazil is the topmost destination for India's engineering exports in the Latin American region. India's engineering exports to Brazil crossed USD 2 billion for the first time to reach USD 2.1 billion in 2023-24, registering a growth of 7.6% over fiscal 2022-23. During the current fiscal 2024-25 Indian engineering exports to Brazil

recorded further growth of 12% during April-October 2024-25 reaching 1.31 billion as against USD 1.18 billion during the same period of the previous fiscal. India's major engineering product groups exported to Brazil include auto components/parts, electric machinery and equipment, industrial machinery for dairy etc, Iron and Steel, auto tyres and tubes, and Aluminium and its products among others.

The product profile of 'Expomafe' broadly comprises of two engineering segments, Industrial Machinery and other construction machinery. India's exports of these two segments to Brazil conceded 2.5% year-on-year decline in 2023-24 but in fiscal 2024-25 till October, the cumulative export was recorded at USD 400 million that was around 30% higher over the same period of fiscal 2023-24. Rising exports from the focus product segments in this fiscal will surely be encouraging as well as beneficial for the member exporters exporting those products to Brazil.

OPPORTUNITY FOR INDIAN ENGINEERING INDUSTRY

India and Brazil are mostly complementary economies, creating opportunities for trade and investment cooperation. Indian engineering industry has enormous potential to explore and make its prominence felt in the Brazilian and Latin American markets in general. There has been several G2G meetings between both nations in the last couple of years that is a strong indication of the trade to rise significantly between the nations. India's exports of industrial machinery, including construction machinery are surely helping the industrial infrastructure of the Latin American giant. A greater cooperation between the world's two largest democracies, is in order and will certainly benefit both countries, since their economies can share enormous synergies and supplement each other. Demand for Indian engineering products in Brazil is on the rise that shows that the time is apt for Indian exporters to participate in the FEIMEC and explore the Brazilian market.



EEPC INDIA AT INTERNATIONAL FASTENER EXPO

15 - 17 SEPTEMBER 2025 | LAS VEGAS, USA

LARGEST B2B EVENT OF FASTENERS, PRECISION FORMED PARTS,
FASTENER MACHINERY & TOOLING IN NORTH AMERICA

HIGHLIGHTS

- International Fastener Expo will be held in Las Vegas, USA between 15-17 September, 2025
- U.S. is India's topmost trading partner both in terms of merchandised goods and engineering goods

International Fastener Expo brings together the manufacturers and master distributors of fasteners, precision formed parts, fastener machinery & tooling and other related products and services with distributors and sales agents in the distribution chain. This event is the North American region's largest B2B event of its kind for the fastener and machinery & tooling industries.

Each year, thousands of attendees travel to North America's #1 trade show city, Las Vegas, Nevada to network and do business with hundreds of suppliers showcasing every type of fastener for several industries including construction, aerospace, military, electrical, and automotive. Electronic fasteners, specialty tooling products, special application fasteners, tooling and machinery, hand tools, power tools, service solutions, and much more will be on display.

IMPORTANT INDUSTRIES FOR THE INDIAN FASTENER MANUFACTURERS:

- Aerospace, Aircraft, Engine & Parts
- Agriculture / Off Highway Machinery
- Assembly, Production & Factory Equipment
- Automotive / After Market
- Civil, Precision, Mechanical Engineering
- Construction / Electrical Equipment
- Electronic / Technology
- Energy, Engine & Turbine
- Maintenance and Repair Operations
- Marine / Ship Building
- Medical
- Military
- Small Appliances
- Truck & Bus

ECONOMIC SCENARIO OF USA

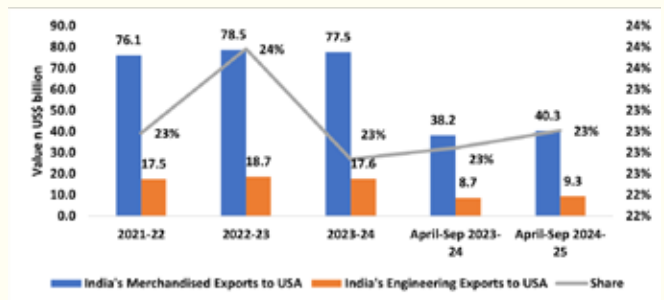
The United States continues to be the world's largest nominal GDP and net wealth, ranking second in GDP by PPP, behind China. The U.S. economy is expected to grow by 2.7% in 2024. This is a slowdown from the 4.9% annualized growth recorded in Q3 2023, reflecting the impact of higher inflation and tighter financial conditions. Higher inflation and tighter financial conditions are anticipated to impact spending plans across the economy, affecting both consumers and businesses. Overall, while the U.S. economy faces challenges such as higher tariffs and tighter immigration policies, it is expected to outperform many other developed economies in 2025, driven by strong domestic fundamentals and a favorable global economic environment.

Real GDP Growth rate of USA (2019 to 2024)



Source: IMF

India's Merchandised and Engineering exports to USA (USD Bn.)



Source: DGCIS

BILATERAL TRADE BETWEEN INDIA AND USA



The U.S. is India's topmost trading partner both in terms of merchandised goods and engineering goods as well during 2023 (Trade Map). The two countries have a total bilateral trade of around US\$ 119.7 billion during 2023-24 witnessing a negative growth of 7.5% and around US\$ 62.63 billion during the current fiscal of April-Sep 2024-25. Engineering trade accounts for around 25% of bilateral merchandise trade between India and USA. India's engineering exports to USA witnessed a negative growth of 5.7% during 2023-24 compared to same period last year.

However, in the current fiscal, engineering exports registered a positive growth to the extent of 5.8% reaching to US\$ 10.71 billion during April-Oct 2024-25 compared to US\$ 10.12 billion during same period last fiscal. USA has been consistently the top most exporting destination for India's engineering products for the last five years. On the other hand, North America region ranks as the top most destination for shipment of engineering products from India during April-Oct 2024-25 with a share of 20.4% percent of total engineering exports. Major engineering products exported to USA include products of iron and steel, electric machinery and equipment, auto components/parts, industrial machinery for dairy, aluminium and products, Other Industrial Machinery, etc. Major products imported from USA include Gas turbines and turbo jets, powered aircrafts, ferrous waste and scrap, Aluminium waste and scrap, medical instruments and appliances, parts of tractors, etc.

Given the profile of fasteners, India globally exports more than 26% of fastener to USA, 6.9% to UAE, 6.8% to UK, 5% to Germany, 4.8% to Netherland and remaining 50.5% to other countries during 2023 (Trade Map). India ranks as the 9th destination in terms of USA's global import of fasteners. The top importers being China (24.2%), Mexico (15.3%), Taiwan (14.7%), all three constituting more than 54.2% share of USA imports, while other importing destinations include Canada (6%), Japan (5.6%), Germany (5.3%), whereas imports from India constitutes a share of 2.8% during 2023.

OPPORTUNITY FOR INDIAN EXPORTERS IN USA

Indian exporters have a wealth of opportunities in the USA, particularly in the engineering sector. The USA's import basket prominently features products such as Electrical Machinery and Equipment, Industrial Machinery, Ferrous and Non-Ferrous Metal Products, and Automobile and Auto Components. Given India's strong export performance in these segments, Indian producers and traders are well-positioned to expand their presence in the US market. Participating International Fasteners Expo 2025 will enable Indian exporters to identify new market trends, discover innovative products, and establish connections with key industry players. This can lead to increased market penetration and growth opportunities in the US. Additionally, the expo will help Indian companies understand the specific requirements and standards of the US market, allowing them to tailor their products accordingly and enhance their competitiveness.

Product Profile

- Fasteners: Screws, Nails, Nuts, Bolts, Washers, Anchors & Rivets
- Production Machinery, Tool & Die, Supplies
- Inspection/Testing/Packaging Equipment
- Specialty Fasteners and Tooling
- Plant Maintenance & Safety Supplies
- Fastener Technology & Services

EEPC INDIA AT MACH & TOOLS, SAUDI & GULF 4P

1 - 4 DECEMBER 2025 | DHAHRAN, SAUDI ARABIA

**2nd INTERNATIONAL EXHIBITION FOR INDUSTRIAL MACHINERY,
TOOLS & EQUIPMENT FOR SAUDI ARABIA**

HIGHLIGHTS

- Ideal B2B Platform held at Dhahran, Saudi Arabia between 1 - 4 December 2025
- Gulf 4P 2025 will feature latest products & technologies, with exhibitors presenting their innovations to a target audience of decision-makers



The 2nd International Exhibition for Industrial Machinery, Tools & Equipment for Saudi Arabia will serve as an ideal B2B platform for global manufacturers and suppliers to showcase their latest products, technologies and innovations and to meet with affluent potential business partners across Saudi Arabia and GCC region. Co-located with Gulf 4P, this 2-in-1 show will provide visitors with a comprehensive look in these inter-connected industries, giving them a holistic understanding of the latest technologies and innovations in the manufacturing sector, in an immersive environment, creating synergies and revealing a range of possibilities that will change the future of industrial success. Gulf 4P 2025 will feature the latest products and technologies in the industry, allowing exhibitors to present their innovations to a targeted audience of decision-makers. Dhahran International Exhibition Centre (DIEC), located in Saudi Arabia's Eastern business hub, is a modern venue with advanced facilities. Its proximity to GCC countries makes it ideal for international exhibitions, attracting visitors from the UAE, Kuwait, Bahrain, Qatar, and beyond.

WHY SAUDI ARABIA?

Saudi Arabia is at the forefront of an exciting economic transformation, blending traditional strengths with futuristic ambitions, and the Kingdom's industrial and manufacturing landscape is set for a remarkable expansion. The country is aiming to triple its number of factories from its currently number of 10,000 to a staggering 36,000 by 2035. Even more impressive, 4,000 of these facilities are slated to be fully automated, marking a significant leap into industry 4.0

Saudi Arabia's industrial machinery and equipment market is projected to grow by 4.72% (2023-2028), reaching a market volume of US\$ 4.16 billion in 2028. The Kingdom's machinery industry is set for expansion, with a \$26 billion investment from the National Industrial Development Centre and the ambitious goal of tripling GDP within the industrial sector under Vision 2030.

In the realm of manufacturing, Saudi Arabia's industrial production grew by

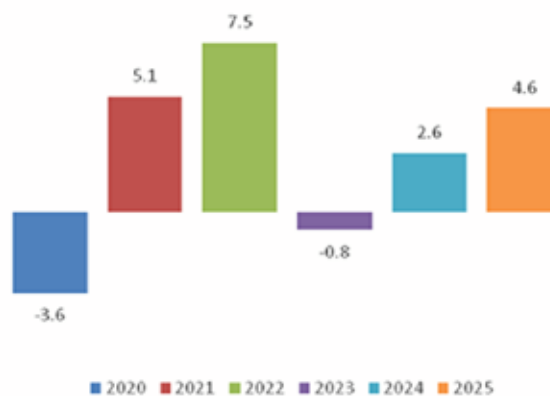
5% year-on-year in October 2024, marking the fastest pace in four consecutive months of growth. This surge was driven by a remarkable 12.4% increase in manufacturing activity. The Kingdom's Advanced Manufacturing Hub Strategy has identified more than 800 investment opportunities totaling \$273 billion, all aimed at diversifying the industrial sector. This ambitious plan aligns with Saudi Arabia's vision to transform its economic landscape.

ECONOMIC SCENARIO OF SAUDI ARABIA

Saudi Arabia is the largest economy in the Middle East and the richest Arab country. The policy of large-scale public works undertaken by the authorities, as well as foreign direct investment and the soundness of the banking and financial system, have enabled the country to become the number one regional economy and one of the largest in the world.

Saudi Arabia's economic outlook is promising, underpinned by its Vision 2030 strategy focused on diversifying from oil to a knowledge-based economy. Investments in non-oil sectors like tourism, technology, and renewable energy, along with business environment reforms to attract foreign investment, position the country for positive long-term growth and regional economic leadership despite near-term global challenges. Vision 2030 is a blueprint that is diversifying the economy, empowering citizens, creating a vibrant environment

Real GDP Growth rate of Saudi Arabia(2020 to 2025)

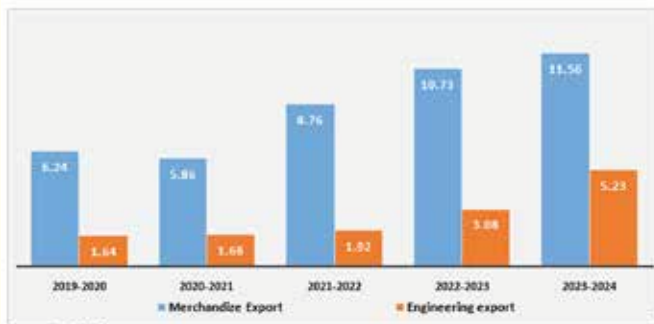


Source: IMF

for both local and international investors, and establishing Saudi Arabia as a global leader.

The manufacturing sector is one of the focus area, aiming at increasing productivity and quality and development of promising industries in food, medicine, and medical supplies, as well as military industries and industries relating to oil, gas and petrochemicals, mining as well as chemicals. This expansion will enable Indian exporters to capitalize on these emerging opportunities across diverse sectors in the Saudi Arabia.

India's total vis-à-vis engineering exports to Saudi Arabia(USD Bn.)



Source: DGCI&S

INDIA AND SAUDI'S BILATERAL TRADE

The Saudi Arabia ranks among the top five export destinations for India's engineering industry, standing as the second largest within the WANA region during 2023-24. From 2019-20 to 2023-24, Indian exports to the Saudi Arabia surged from USD 6.24 billion to USD 11.56 billion. Saudi's imports of engineering goods from India also witnessed a significant uptick, soaring to USD 5.23 billion in 2023-24 from USD 1.6 billion in 2019-20.

The product profile of Mach & Tools Saudi 2025 includes industrial machinery, tools, and equipment. In the 2024-25 (Apr-Feb) period, India's exports of industrial machinery to Saudi Arabia reached USD 601.4 million, while machine tool exports were USD 30.6 million, registering phenomenal growth of 45% and 231% respectively over 2023-24 (Apr-Feb). India was the 9th largest supplier of machinery to Saudi Arabia in 2023.

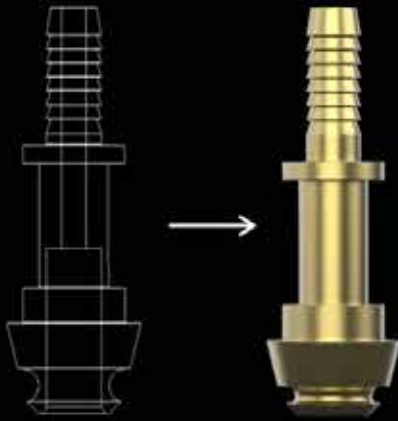
OPPORTUNITY FOR INDIAN INDUSTRIAL MACHINERY INDUSTRY IN SAUDI ARABIA

There has been growing focus on enhancing domestic manufacturing and development of strategic industries, through creation of specialized manufacturing clusters involving many investment opportunities. The Saudi Kingdom launched the National Industrial Strategy (NIS) which aims to increase the number of manufacturing facilities to more than 35,000 factories by 2035, in support of Vision 2030 economic diversification objectives. For the Machinery & Equipment industry, the economy is focusing on building a vibrant industrial equipment and machinery cluster focused on traditional product categories that are regionally competitive as well as to develop globally competitive national champions in key emerging technologies.

As one of the growing and dynamic markets in the Middle East, Saudi Arabia aims to diversify their economy away from oil dependency significant investments to infrastructure, manufacturing and industrial sectors, creating a robust demand for advanced machinery and equipment. The construction of mega-projects like NEOM, the Red Sea Project, and numerous industrial cities are key drivers, creating a growing market for machinery and tools.

For Indian exporters, this presents a significant opportunity. India's well-established manufacturing base and competitive pricing make it an attractive supplier of industrial machinery and equipment. Indian companies can capitalize on the demand for cost-effective yet high-quality machinery, particularly in areas like construction equipment, manufacturing machinery and precision tools. Furthermore, the growing emphasis on sustainability and advanced technology in Saudi Arabia opens avenues for Indian exporters specializing in green technology and automation solutions. This symbiotic potential, underpinned by strong bilateral trade relations, positions Indian exporters to significantly benefit from Saudi Arabia's industrial expansion.

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FOCUS

EEPC INDIA'S DEDICATED PRODUCT PANELS

EEPC INDIA PROMOTING EXPORTS OF ALL PRODUCT SEGMENTS

EQUAL IMPORTANCE GIVEN TO MACHINE TOOLS, HAND TOOL & CUTTING TOOLS AND FASTENERS

HIGHLIGHTS

- **Separate Product panels to highlight varied products**
- **Encouraging Exporters to participate in leading International Tools Expos**

E EPC India has dedicated product panels on Machine Tools, Hand Tools & Cutting Tools and Fasteners. This shows how we give importance on promoting exports of all these varied product segments. EEPC India also partakes and encourages Indian Manufacturers and Exporters to participate in leading International Tools Expos to add the required fillip to the outbound shipments of these products and increase the export market by bringing these products and their details to a wider audience

INTRODUCTION

Machine tools are extremely significant for engineering sector as it supplies machinery for all manufacturing sectors. It is also an integral part of India's capital goods industry which serves as a strong base for its contribution to sectors including engineering, construction, infrastructure and consumer goods. The Indian machine tools industry has performed well in the last few years. The industry has recorded a growth of 32% year-on-year in 2022-23. During the same period, consumption has also increased by 55%. India currently ranks 9 in Production and 7th in Consumption, globally, as per estimates from Gardner Intelligence's World Machine Tool Survey 2022. The infrastructure push by the government of India along with the PLI scheme have been major drivers of India's machine tools industry. Also increase in demand in automobile sector especially in electrical vehicles (EVs) has been a driving force. The industry is projected to grow at 12% to 17% in the next three years. Various types of machine tools currently manufactured in India include General/Special Purpose Machines, Standards CNC machines, Gear cutting, Grinding, Medium sized machines, EDM, Presses, Press Brakes, Pipe Bending, Rolling, Bending, Measuring, metrology and gauging, etc.

INDUSTRY COMPOSITION

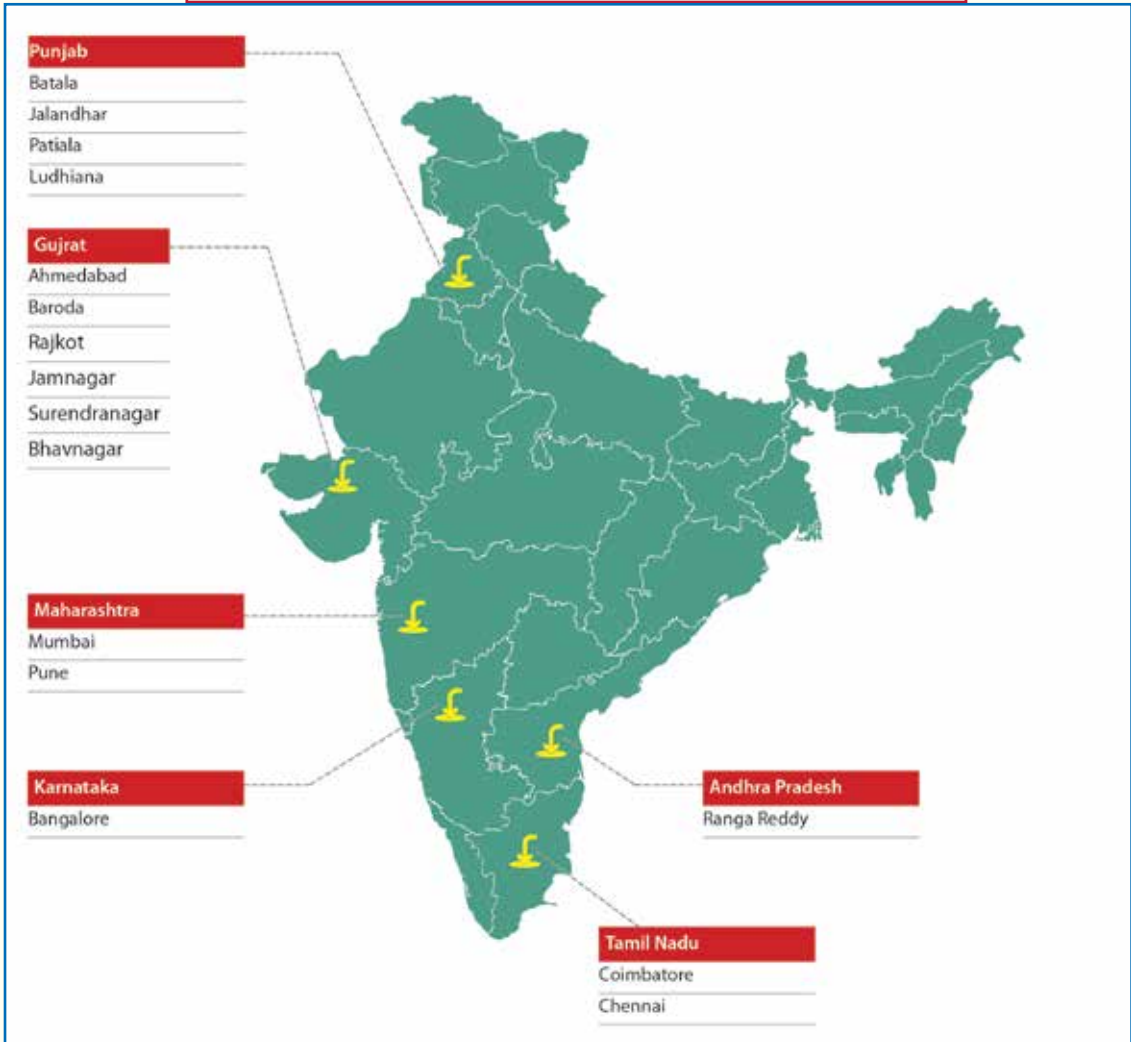
Metal cutting machine tools industry plays a very im-

portant role in Indian manufacturing industry with 80% of India's machine tool demand generating in metal cutting machine tools. India also has some import dependency in metal cutting machines with 47% of the total demand being imported. Metal forming machines also play a prominent role in India's manufacturing although it constitutes 20% of the total machine tools demand in India. Growth in auto and auto component industries have driven the growth of metal cutting machines in India. About 90% of the total production of metal cutting machines take place in Bengaluru, Pune, Mumbai, Ahmedabad and Chennai.

The industry has around 1000 units involved in the production of various types of machine tools and their accessories and parts. While the large companies account for 70% of the turnover, most companies are located in the medium and small segments. Metal forming machineries serve as the chief manufacturing machinery in industries such as consumer durables, automobile and electronics. Other industries which require metal forming machines include aerospace, power, construction, railways, heavy transportation, office furniture, instrumentation industry, steel industry, forging, and structural engineering. Most metal forming machineries in India are manufactured in Baroda, Coimbatore, Jalandhar, Pune and Ludhiana.



MACHINE TOOLS CLUSTERS IN INDIA



THE TABLE BELOW LISTS THE DIFFERENT TYPES OF MACHINE TOOLS AS PER HS CODES:

HS code	Product description
A. Metal cutting machines	
1. Lathes	
84581100	Horizontal lathes, numerically controlled
84581911	Automatic, single spindle horizontal bar, swiss type
84581912	Automatic, single spindle, bar sliding head type
84581913	Automatic, single spindle horizontal chucking
84581919	Other automatic, single spindle horizontal lathes
84581990	Other horizontal lathes
84589100	Other numerically controlled lathes

HS code	Product description
84589910	Automatic, multi-spindle bar
84589920	Automatic, multi-spindle chucking
84589931	Capstans
84589932	Turrets
84589933	Capstan & turret combination
84589934	Copying lathes
84589935	Multi-tool and production
84589941	Crank shaft
84589942	Relieving
84589943	Wheel and axle
84589951	Centre lathes, tool-room type
84589959	Centre lathes, others
84589990	All other lathes excl centre lathes
2. Boring-milling machines	
84572010	Unit head boring
84593100	Boring-milling machines, numerically controlled
84593910	Vertical turning or boring
84593990	Others
84594010	Jig, boring machines, horizontal
84594020	Fine boring machines, horizontal
84594030	Fine boring machines, vertical
84594090	Others
84595110	Horizontal
84595120	Vertical
84595130	Universal
84595190	Other numerically controlled knee-type milling machines
84595910	Horizontal
84595920	Vertical
84595930	Universal
84595940	Ram type
84595950	Die-sinking or pantograph
84595990	Others
84596110	Piano milling
84596190	Others
84596910	Bed type, horizontal
84596920	Bed type, vertical
84596930	Piano milling, single column
84596940	Plano milling, double column
84596990	Others

HS code	Product description
3. Drilling machines	
84592100	Drilling machines, numerically controlled
84592910	Bench and pillar
84592920	Pillar or columns, multi-spindle
84592930	Radial
84592940	Deep hole
84592950	Multi head drilling machines
84592990	Others
4. Taping and threading machines	
84597010	Threading machines
84597020	Taping machines
5. Grinding machine	
84601100	Numerically controlled flat-surface grinding machines in which the positioning in one axis can be set up to an accuracy of at least 0.01 mm
84601900	Other flat surface grinding machines in which the positioning in one axis can be set up to an accuracy of at least 0.01 mm
84602100	Other numerically controlled grinding machines where the positioning in any one axis can be set up to an accuracy of at least 0.01 mm
84602910	Cylindrical, plain & universal
84602920	Internal, grinder
84602930	Centreless grinders
84602940	Profile grinders
84602990	Others
84603100	Numerically controlled sharpening(tool/ cutter grinding machines)
84603910	Grinder, tool/cutter
84603990	Others
6. Honing and lapping machines	
84604011	Honing, vertical, single spindle
84604012	Honing, vertical, multi spindle
84604013	Honing, horizontal
84604019	Other honing machines
84604020	Lapping machines
7. Broaching machines	
84613010	Vertical broaching machines
84613020	Horizontal broaching machines
84613090	Other broaching machines
8. Gear Cutting machines	
84614011	Gear cutting bevel
84614012	Gear cutting spiral bevel &/or hypoid
84614013	Gear slotter /planar formed cutter type
84614014	Gear milling formed disc cutter type

HS code	Product description
84614019	Gear cutting & generating machines n.e.s.
84614021	Gear grinder single/double wheel disc type
84614022	Gear grinder, formed wheel
84614023	Gear shaver
84614024	Gear tooth, rounding, chamfering/burring
84614025	Gear shaper, spur & helical
84614026	Gear hobber, spur & helical
84614029	Other gear finishing machines
9. Sawing machines	
84615011	Band saw, horizontal
84615012	Band saw, vertical
84615013	Circular saw, cold
84615014	Circular saw, hot
84615015	Hack saw
84615019	Other sawing machines
10. Other cutting and sawing machines	
84615021	Abrasive wheel cutting-off machines
84615029	Other cutting-off machines
84619000	Other machine tools of heading no 8461
84641010	Granite cutting machines, equipment etc
84641090	Other sawing machines
84642000	Grinding/polishing machines working stone etc
84649000	Other machine-tools of heading 8464
84609010	Polishing & buffing machines
84609090	Others
11. Shaping and slotting machines	
84612011	Die & punch shaping machines
84612019	Other shaping machines
84612020	Slotting machines excl for gears
84612011	Die & punch shaping machines
84612019	Other shaping machines
84612020	Slotting machines excl for gears
12. Other metal cutting machines	
84561000	Machine-tools operated by laser/other light or photon beam processes
84562000	Machine-tools operated by ultrasonic processes
84563000	Machine-tools operated by electro-discharge process
84569100	Other machine-tools for dry-etching patterns on semiconductor materials
84569910	Electro-chemical machines
84569990	Others

HS code	Product description
B. Metal forming machines	
84621011	Hammers, steam/air, single frame
84621012	No record found
84621013	Hammers, headers & upsetters
84621014	Hammers, double acting counter blow ,air/steam
84621019	Other hammers
84621020	Forging machines, n.e.s.
84621030	Stamping machines, metal working
84622100	Numerically controlled bending, folding, straightening /flattening machines(including presses)
84622910	Bending&/or straightening machines
84622920	Press brakes
84622930	Rotary head & ram type
84622990	Others
84623100	Numerically controlled shearing machines(including presses),excluding combined punching & shearing machines
84623910	Plate & sheet shears(guillotine)
84623920	Bar & angle shearing & cropping
84623990	Others
84624100	Numerically controlled punching/notching machines (including presses),including combined punching & shearing machines
84624910	Punching machines (including turret)
84624920	Combination of punching, shearing and cropping machines
84624930	Nibbling machines
84624990	Other punching & notching machines
84629110	Hydraulic extension
84629190	Others
84629911	Pneumatic presses
84629912	Inclinable presses
84629913	Vertical gap of frame presses
84629914	Vertical straight presses
84629915	Vertical forging presses
84629919	Other machine tools (including presses)
84629920	Dyeing /lobbing machine presses
84629930	Transfer & multiple presses
84629940	Horizontal presses
84629950	Friction screw presses
84629960	Knuckle joint presses
84629970	Coining joint presses
84629990	Other presses (mechanical & manual)
84631010	Wire & metal ribbon drawing machines

HS code	Product description
84631020	Wire making machines
84631030	Tube drawing machines
84631090	Others
84632000	Thread rolling machines
84639010	Riveting machines(excl portable hand)
84639020	Strip profiling
84639030	Seaming machine (e.g. for cans)
84639090	Others
C. Metal working machines	
84572090	Other unit construction machines ,single station
84573010	Rotary type multi-station transfer machines
84573020	In-line type multi-station transfer machines
84573090	Other multi-station transfer machines
84591000	Way-type unit head machines
84651000	Machines which can carry out different types of machining operations without tool change between such operations
D. Machining centres	
84571010	Machining centres horizontal
84571020	Machining centres - vertical
E. Machine tools for wood working	
84659100	Sawing machines for working wood ,cork ,bone etc
84659200	Planing, milling/moulding machines for working wood etc
84659300	Grinding/polishing machines for working wood, cork etc
84659400	Bending/assembling machines for working wood etc
84659500	Drilling/morticing machines
84659910	Lathes for working wood etc
84659990	Others
F. Pneumatic machine tools	
84671110	Pneumatic drills
84671120	Pneumatic hammers
84671190	Other pneumatic rotary type tools for working in hand
84671900	Others pneumatic tools
G. Machines with self-contained electric motor	
84672100	Drills with self- contained electric motor
84672200	Saws with self-contained electric motor
84672900	Other machines with self-contained electric motor
84678100	Chain saws for working in hand
H. Other machine tools	
84678910	Grease guns, lubricators etc.
84678920	Vibrators, non-electric

HS code	Product description
84678990	Others
9. Parts and accessories of machine tools	
84661020	Self-opening dye-heads
84662000	Work holders
84663010	Chucks, mechanical/pneumatic
84663020	Jigs & fixtures for machine-tools
84663090	Others
84669100	Parts & accessories for machines of heading no. 8464
84669200	Parts & accessories for machines of heading no.8465
84669310	Parts and accessories of machine-tools, for working metals
84669390	Other parts accessories, attachment for machine-tool
84669400	Parts & accessories for heading no.8462/8463
84679100	Parts of chain saws
84679200	Parts of pneumatic tools
84679900	Parts of other tools for working in hand

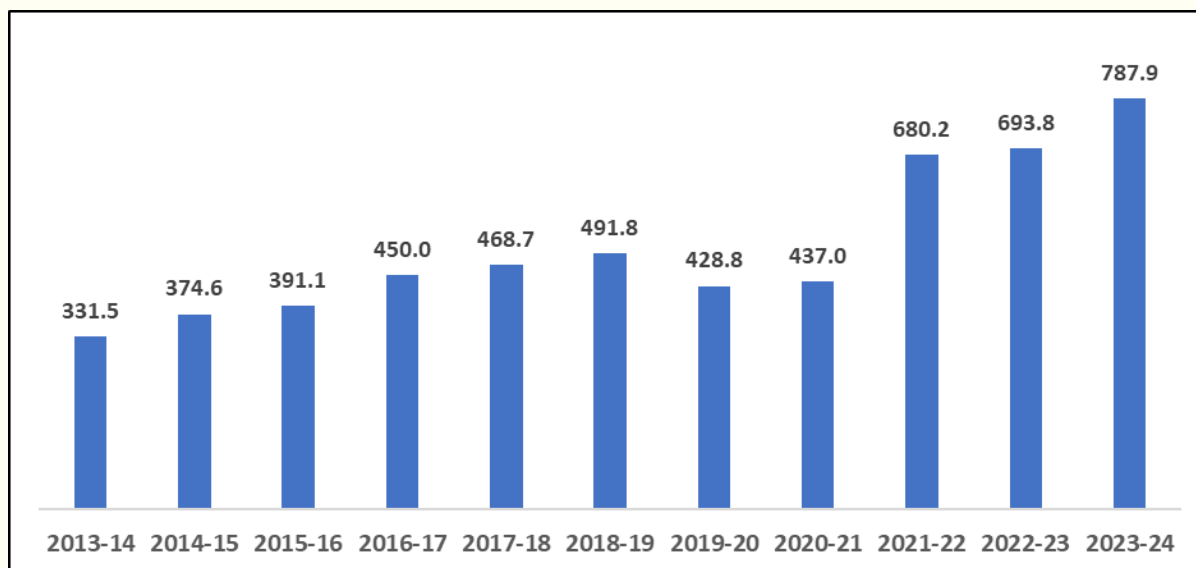
EXPORT TREND IN INDIA'S MACHINE TOOLS INDUSTRY

Since last 10 years between 2013-14 and 2022-23, India's machine tools exports increased at a CAGR of 8.6%. Even in the current fiscal (April-November 2023-24), India's machine tools exports increased by 7.6% in y-o-y basis. The figure below indicates the export trend

in machine tools in the last 10 years

More than 20% of India's machine tools exports are sent to South East Asia, followed by EU and Africa. The Gulf countries are also emerging as potential destinations. The figure below indicates the regional spread of India's machine tools industry. Also in Table 1 we have indicated the top 10 export markets for Indian machine tools industry.

Figure 1: India's Machine Tools Export Trend in the last 10 years (USD Mn.)



Source: DGCI&S

Figure 2: Regional Spread of India's machine tools export

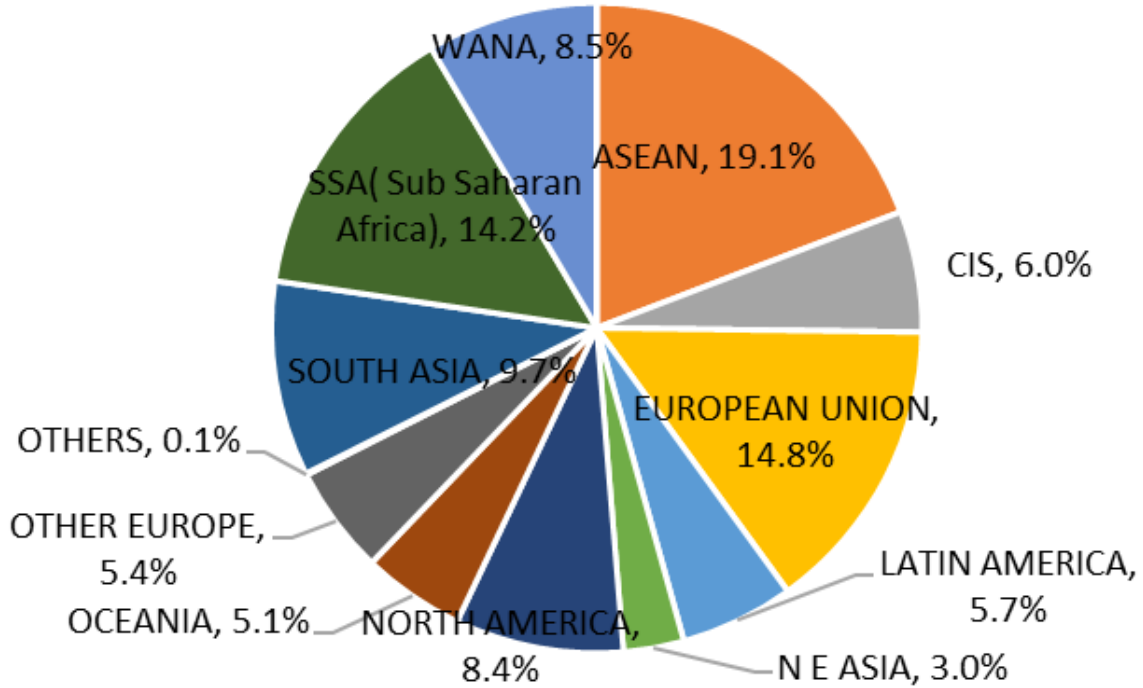


Table 1: Top 10 export destinations of India's machine tools (USD million)

Top export destinations	India's exports, 2022-23	India's exports, 2023-24	Growth %
U S A	178.50	190.31	6.62
RUSSIA	14.12	76.12	438.98
GERMANY	56.93	57.05	0.21
UAE	28.98	39.22	35.33
CHINA	36.67	37.54	2.38
BELGIUM	27.39	36.31	32.55
ITALY	37.67	29.40	-21.96
MEXICO	14.02	21.01	49.89
NETHERLAND	23.00	19.03	-17.27
TURKEY	9.58	17.52	82.83

In the global market, China and developed countries such as Germany, Japan and USA are the champions in terms of machine tools exports. India ranks 28 in the global list of machine tools suppliers. Table 2 indicates India's contribution in the machine tools import of its top export markets.

Table 2: India’s position in top 5 export destinations of machine tools (USD billion)

India’s top importers	Global import 2023	Top 5 suppliers and share %	India’s rank
U S A	17.28	China (18.7), Germany (13.2), Japan (13.0), Vietnam (8.3), Taipei (8.2). India (0.96)	15
RUSSIA	Updated data not available		
GERMANY	7.09	China (21.6), Switzerland (14.5), Austria (7.1), Japan (6.7), Italy (5.8), India (0.7)	24
UAE	0.5	China (37.7), Italy (8.6). Germany (7.9), USA (7.8). India (5.4)	5
CHINA	7.13	Japan (29.8), Germany (26.6), Taipei (14.3), Switzerland (4.8), Italy (4.7). India (0.47)	19

Source: ITC Trade Map

GOVERNMENT SCHEMES IN INDIAN MACHINE TOOLS INDUSTRY

The government of India has introduced a number of policies for the advancement of Indian capital goods industry which is expected to benefit the machine tools sector. The major schemes are highlighted below:

1. Scheme for Enhancement of Competitiveness in Indian Capital Goods Sector -Phase I & II

The first phase of the Capital goods Scheme was introduced in 2014 with an outlay of INR 995.96 crore. It was launched to address the skill gaps and infrastructural gaps in India’s capital goods industry. The outcome of the Scheme has proved the efficacy of the strategies deployed for technology and industrial infrastructure development. The salient features of the first phase include

- Centre of Excellence: 8 CoEs have been established wherein 25 new technologies in the field of machine tools, textile machinery, earth moving machinery, nano and sensor technologies have been developed at national research institutes of eminence such as Indian Institute of Technology (IITs), Indian Institute of Sciences (IISc), Central Manufacturing Technology Institute (CMTI) etc.

and a number of these technologies has been commercialized.

- Common Engineering Facility Centres: 15 such centres including four Smart Advanced Manufacturing and Transformation Hub (SAMARTH) centres and six web-based technology innovation platforms have been set up. The platforms are bringing India’s technical resources and the concerned industry in one common platform to identify and facilitate a solution for the technological needs of the industry.
- Technology Acquisition Fund Programme
- Also, an exclusive industrial park for machine tool industry has been developed across 530 Acres, at Tumkuru, Karnataka. So far, out of 336 acres of allottable land, 145 acres of land has been allotted to the machine tool manufacturers. The salient features of the Machine Tools Park are follows
 - » The Park has state of art infrastructure consisting of Green Cover Area, Incubation, Test & Certification Centre & Common Engineering Facilities Centre to improve productivity and create new capacities across the supply chain.
 - » It is a step forward in making the machine tool sector cost effective, hi-tech machine tools,

enhanced export capability and attracting more investment.

- » It will encourage investment in technology upgradation, skill development and augmentation of modern manufacturing capacities for holistic growth of Industry and SMES, Startup, R & D, incubation Centre etc
- » It will help to improve the Economy of the Country/State, GDP/GSDP and employment generations (directly and indirectly).
- » It will also help to reduce the imports of Capital Goods and improve the Forex Reserves.

The second phase of the scheme was launched in January 2022 whereupon the first phase incentives were merged with it. The second phase aimed to expand the positive impact of the first phase of the Capital Goods Scheme. The scheme has a financial outlay of Rs. 1207 crores with Budgetary support of Rs.975 crore and Industry Contribution of Rs.232 crores. A total of 32 projects have been sanctioned so far under the Phase-II of the Scheme for Enhancement of Competitiveness in the Indian Capital Goods Sector. There are six components under the Scheme for Enhancement of Capital Goods Sector Phase II and the details of the projects sanctioned so far are as follows:

- **Setting up of New Advanced Centres of Excellence and augmentation of Existing Centres of Excellence-** To expedite R&D by utilizing academia of repute and private industry which is involved in research and development activities.
- **Setting up of Common Engineering Facility Centres (CEFCs) and augmentation of existing CEFCs-** For creating demonstration & training, consultancy, hand holding and R & D services and awareness programmes to industrial units.
- **Promotion of skilling in Capital Goods Sector** –Creation of Qualification packages for skill levels 6 and above- in association with Skill Councils for skills level 6 and above.
- **Augmentation of Existing Testing and Certification Centres-** to address the needs of Capital Goods Sector & Auto sector for testing of machinery in terms of various properties relating to mechanical, electri-

cal, chemical, structural, metallurgical, electronics aspects etc.

- **Setting up of Industry Accelerators for Technology Development** - Aimed at development of targeted indigenous technologies, scaled to meet the requirements of selected industry segment, which till now has been dependent on imports. Selected Academic Institute/ Industry Body will act as an Accelerator for fostering the development of such technologies.
- **Identification of Technologies through Technology Innovation Portals** -Six Web-based open manufacturing technology innovation platforms have been developed under CG Scheme Phase-I. These are being supported under CG Scheme Phase-II.

For more details please visit:

<https://static.investindia.gov.in/s3fs-public/2022-01/Notification%20for%20Capital%20Goods%20%20Phase%20II%20.pdf>

2. National Capital Goods Policy:

Indian Capital goods Policy launched in 2016 also included machine tools as one of its sectors and was aimed at making the sector globally competitive. For machine tools the scheme envisaged:

- Supporting industry to develop and manufacture high technology and high value products and critical components and raw materials
- Encouraging acquisition of potential overseas companies
- Omitting machine tools from critical trade agreements especially those with strong countries
- Developing “technology centres” in key markets such as Thailand, Turkey, Brazil and Mexico
- Providing greater incentive for technology development especially among MSMEs
- Enhancing depreciation and investment allowance

For more details please visit:

<https://heavyindustries.gov.in/sites/default/files/2023-07/Capital-Goods-Policy-Final.pdf>

3. Ministry of MSME Schemes

There are a number of Ministry of MSME schemes which also benefits the machine tools industry. These include:

- **Technology and Quality Upgradation Support for MSMEs:** The scheme advocates the use of energy efficient technologies (EETs) in manufacturing units so as to reduce the cost of production

and adopt clean development mechanism.

- **Enabling manufacturing sector to be competitive** through adopting latest Quality management Standards (QMS) and Quality Technology Tools (QTT)
- **Financial support for MSMEs** in Zero Defect zero Effect (ZED) certification scheme



THE GLOBAL HAND TOOLS INDUSTRY

The global hand tools market has experienced substantial growth in the recent years due to growth of some of its end-user industries including construction, automotive, etc. Increasing Do It Yourself (DIY) activities especially drilling, hammering and sawing are also driving the market. As per recent market research report, global hand tools industry was valued at USD 21.85 billion in 2021 and is expected to grow at a CAGR of 4.3% between 2021 and 2030.

As mentioned above, increasing DIY activities are one of the main drivers of the global hand tools market. Hence general purpose tools which are easy to use and do not need much technical skill accounts for the largest market share. In 2021, the share of general purpose tools in total global hand tools market was 66.6%. Recent market reports also forecast that cutting tools category including saws, chisels, knives and blades and cable and wire cutting tools would experience highest growth among all hand tools categories. Globally hand tools

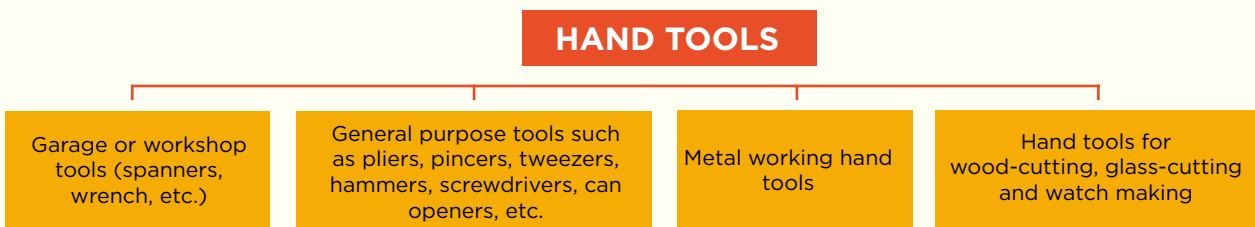
markets in the Asia Pacific region (APAC) are expected to exhibit maximum growth in the coming years.

STRUCTURE OF THE INDIAN HAND TOOLS INDUSTRY

The Indian Hand Tools industry is also experiencing a positive growth trend. As per recent statements by the Ministry of MSME, Indian Hand Tools market is valued at USD 342.8 million in 2022 and is projected to reach USD 416.2 million by 2029 growing at a CAGR of 4.3%. Additionally the Industrial fastener market is expected to hit USD 460 billion by end of 2023, exhibiting a CAGR of 9.6% over 2018.

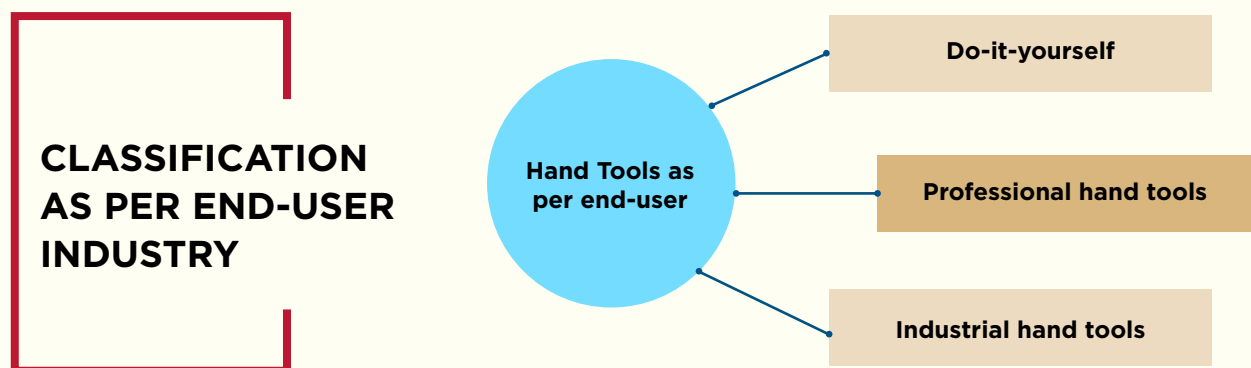
The Indian hand tools market has approximately 2500 manufacturers out of which more than 90% are in the MSME category. The market is fragmented wherein most of the few big players are responsible for maximum revenue share. The sector has a total investment of around INR 5000 million and employs estimated 25000 workers.

Major segments of the industry



THE TABLE BELOW LISTS THE DIFFERENT TYPES OF HAND TOOLS AND CUTTING TOOLS AS PER HS CODES:

HS code	Product description
Garage or Workshop Tools	
82041110	Hand-operated spanners non adjustable
82041120	Hand-operated wrenches (excluding tap wrenches) non-adjustable
82041210	Hand-operated spanners-adjustable
82041220	Hand-operated wrenches(ex-tape wrenches)adjustable
82042000	Interchangeable spanner sockets, with handle or not
82055910	Grease guns (excluding compressed air type)
82060010	Garage tools in sets
Glass cutting tools	
82055990	Other hand tool including glazier's diamonds nes
Household tools	
82055110	Can or cork openers
82055190	Other household hand tools
Metal working tools	
82055920	Metal working hand tools
82059000	Sets of two or more subheadings of 8205
82056000	Blow lamps
82057000	Vices, clamps & the like
Other hand tools	
82032000	Pliers, pincers ,tweezers & similar tools
82054000	Screwdrivers
82052000	Hammers & sledge hammers
82060090	Other tools of two or more of heading no. 8202 to 8205 put up in sets for retail sale
Hand tools for wood cutting and watchmaking	
82053000	Planes, chisels, gauges & similar cutting tools for working wood
82055930	Hand tools for specified uses, such as, watch making tools, goldsmith tools



The major hand tools clusters in India are located in

- Punjab (Jalandhar and Ludhiana)
- Rajasthan (Nagaur)

A few manufacturers are also situated in Mumbai and Delhi as well.



EXPORT TREND IN INDIA'S HAND TOOLS INDUSTRY

Since the last 10 years that is between 2013-14 and 2022-23 India's hand tools exports increased at a CAGR of 3.3% although in the current fiscal (April-November 2023-24), India's machine tools exports decreased by

5% in y-o-y basis. The figure below indicates the export trend in hand tools in the last 10 years.

Around 30% of India's hand tools exports are sent to North America, followed by EU and WANA. ASEAN also has significant potential as export market. Also in Table 1 we have indicated the top 10 export markets for Indian hand tools industry.

Figure 1: India's Hand Tools Export Trend in the last 10 years (USD Mn.)

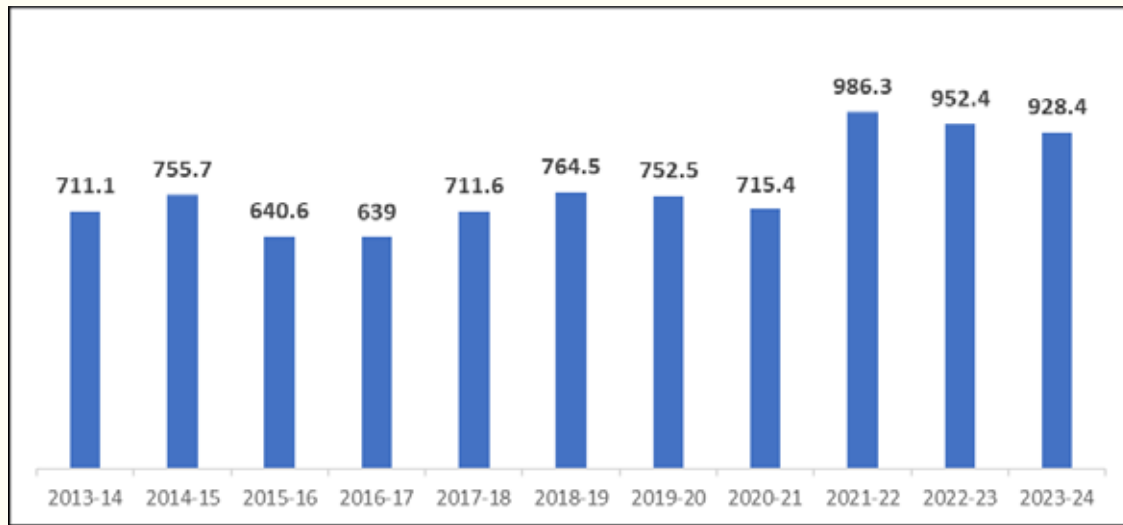
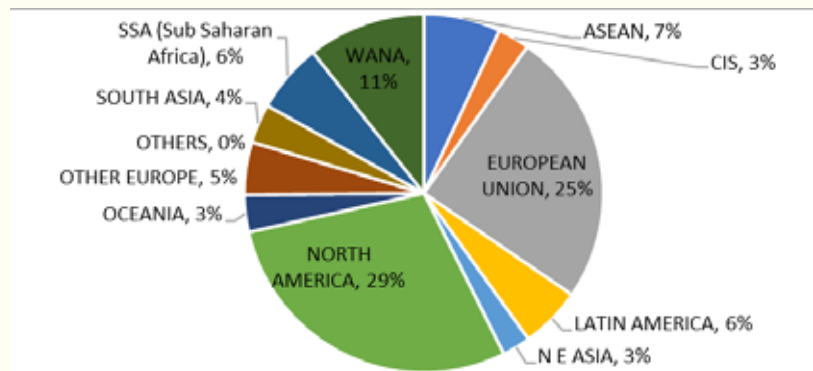


Figure 2: Regional Spread of India's hand tools export



Source: DGCI&S

Table 3: Top 10 export destinations of India's hand tools and cutting tools (USD million)

Top Export Destinations	India's Exports in 2022-23	India's Exports in 2023-24	Growth %
U S A	252.74	258.91	2.44
NETHERLAND	76.05	61.92	-18.59
GERMANY	63.97	59.94	-6.30
RUSSIA	26.50	38.78	46.36
U ARAB EMTS	48.32	37.36	-22.68
BELGIUM	20.77	32.53	56.58
AUSTRALIA	33.34	30.28	-9.16
SINGAPORE	32.78	30.18	-7.93
U K	28.89	28.18	-2.47
BRAZIL	17.66	21.13	19.63

In the global market, China and developed countries such as Germany, USA, etc are the champions in terms of hand tools exports. India ranks 14 in the global list of hand tools suppliers. Table 4 indicates India's contribution in the hand tools import of its top export markets.

Source: DGCI&S

Table 4: India's position in top 5 export destinations of hand tools and cutting tools (USD billion)

India's top importers	Global import, 2023	Top 5 suppliers and share %	India's rank
U S A	9.07	China (29.2), Taipei (11.3), Germany (9.8), Japan (8.1), South Korea (4.5), India (3.6)	8
NETHERLAND	1.65	Germany (30.0), China (17.0), Belgium (7.0), Sweden (6.6), Japan (4.9), India (1.2)	14
GERMANY	5.4	China (24.4), Switzerland (13.7), USA (5.75), Austria (5.0), Czech Republic (4.9), India (1.9)	15
RUSSIA	Updated data not available		
UAE	0.45	China (35.2), USA (14.3), Germany (8.8), India (6.5), Italy (5.01)	4

Source: ITC Trade Map



GOVERNMENT SCHEMES IN INDIAN HAND TOOLS AND CUTTING TOOLS INDUSTRY

The government of India has introduced a number of policies for the advancement of Indian capital goods industry which is expected to benefit the machine tools sector. The major schemes are highlighted below:

- Setting up Central Institute of Hand Tools**
Central Institute of Hand Tools (MSME Tool Room, Jalandhar) is a premier organization responsible for the development of Hand Tool Industry in the country. Government of India has set up Central Institute of Hand Tools as a National Institute in Jalandhar (Punjab) as an autonomous organization with the assistance of U.N.D.P. and Govt. of Punjab in the year 1983, with a view to provide trained manpower and technology support services to engineering industry in general & the hand tools industries in particular. The institute is ISO-9001:2008, ISO-14001:2004 certified and having NABL accredited Lab. Objective of the scheme includes

 - Trained personnel for the industry to adopt improved technology in product design, production technologies, testing & quality control techniques, packing & product development.
 - Design of tools, not manufactured by the industries and prototype development
 - Common facility services for forging, dies, tools, jigs and fixtures.
 - Consultancy services leading to setting up of turnkey projects.
 - Assistance of the small and medium scale industries in the design and development, manufacture of dies, heat treatment of tooling for Hand Tools.
- National Programme for promoting energy efficiency in hand tools SSI sector in India

This is in partnership with DC (SSI), UNIDO, SIDBI, Hand Tool Manufacturers Associations. The objectives of the scheme are:

- Technology upgradation of Hand Tool SSI clusters at Jalandhar (Punjab) and Nagaur (Rajasthan) by

adopting energy efficient & clean technology and other measures.

- Strengthening of Institutional structure & capacity building of CIHT, Jalandhar and HTDDTC, Nagaur.
- Strengthening of Policy framework to promote replication of energy efficient technologies demonstrated.
- Developing an international marketing strategy & support measures for export promotion to enhance the export share of SSI units in the world market.

CONCLUSION

The Indian machine tools and hand tools industries have significant potential in terms of exports. However, India's contribution in global export is very low - merely 0.6% in case of machine tools and around 1.2% for hand and cutting tools. India is far behind its peers including China and EU countries. To increase India's share in the global market both trade creation and trade diversification would be important. It is important for the industry to look out for new markets and also upgrade the quality and technology of the products. Also, with the support from the government we are hopeful that India's tools export will only exhibit a rising trend in the future.





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- INTERNATIONAL FASTENER EXPO LAS VEGAS 2025
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- CWIEME 2025
- SUBCON 2025
- JIMEX 2025
- SAUDI ELENEX 2025
- GULF 4P And TOOLS SAUDI 2025



FASTENERS

The Indian industrial fastener market is a growing sector, projected to reach USD 7.017 billion by 2030, driven by increasing construction, automotive production, and industrial machinery demands. Key players and trends include high-quality fasteners, technological advancements, and global demand.

MARKET OVERVIEW AND GROWTH

- **Market Size:** The Indian industrial fasteners market generated a revenue of USD 4,338.4 million in 2024 and is expected to reach USD 7,017.2 million by 2030.
- **CAGR:** The market is expected to grow at a CAGR of 8.4% from 2025 to 2030.
- **Growth Drivers:**
 - » Increasing construction activities, including residential and commercial projects, and government smart city initiatives.
 - » Rise in automotive production demands.
 - » Overall expansion of industrial machinery.
 - » Development of fasteners applications for manufacturing automotive parts.
- **Key Players:**
 - » Deepak Fasteners Limited (DFL)
 - » TorqBolt Inc.
 - » Jyoti Engineering (Jyoti)
 - » Big Bolt Nut
 - » Boltport Fasteners (BPF)
 - » Kova Fasteners Pvt. Ltd.
 - » Singhania International Limited (STURDFIX/SFX)
 - » Kaloti Group of Companies
 - » Ananka Fasteners Manufacturers
 - » Caliber Enterprises
 - » Bhavya Industries
 - » Avlock India
- **Trends:**
 - » Focus on high-quality fasteners and innovative manufacturing methodologies.
 - » Technological advancements in fastener manufacturing.
 - » Global demand for Indian-made fasteners.
 - » Emphasis on customer satisfaction and meeting specific needs.
 - » Forging & Rolling, Ultra-modern Heat Treatment Facility, and high-quality coating.
- **Challenges:**

-
- » Upgrading technologies and capacities regularly to meet global demand.

FASTENER TYPES AND APPLICATIONS

- The market is divided into segments such as screws, nuts, bolts, washers, anchors, and dowel pins.
- Fasteners are used in various industries, including automotive, construction, aerospace, electronics, and general engineering.
- Applications include manufacturing automotive parts like engines, chassis, moulding, suspension systems, and wheels.

MARKET OVERVIEW

Fasteners are made of stainless steel and are used in many businesses to join, fix, or connect two or more things. Most of the time, they are made of carbon steel, metal steel, or stainless steel. They are covered by a paint or coating that keeps them from rusting. The aerospace, industrial machinery, plumbing, motors, and pump businesses are among these.

Highlights

- Externally threaded dominates the market by product.
- Threaded fasteners dominated the market by type.
- ¼ to ¾ dominated the market by bolt size.
- Automotive dominates the segment by application
- Steel dominated the market by raw materials.

MARKET DYNAMICS

India industrial fasteners market drivers

Growth of the automotive industry

The auto business's growth drives India's need for industrial fasteners. Indian automakers like Maruti

Suzuki, Tata Motors, and Mahindra & Mahindra use a lot of industrial screws to make their cars. Industrial screws assemble important parts like engines, suspensions, and brakes. Due to the growth of the car industry and other manufacturing sectors, India's need for industrial fasteners will likely keep going up over the next few years.

India industrial fasteners market restraints

High competition

Indian companies that make fasteners face tough competition from low-cost companies in China and Taiwan. These companies can make fasteners for less money because their labor costs are lower, and they can make more at once. This has caused prices to go up on the Indian market because local makers can't keep up with their competitors' lower prices. In the automotive business, for example, Indian companies that make fasteners are having difficulty competing with Chinese companies that can make engine bolts, wheel studs, and other important parts for less money. This is especially hard for Indian manufacturers because the automotive business is one of the biggest users of industrial fasteners in the country.

India industrial fasteners market opportunities

Urbanization and industrialization

As India continues to build cities and factories, the need for infrastructure and building projects is growing quickly. This is a big chance for the Indian industrial fasteners market since fasteners are important parts of building and infrastructure projects. For example, the Smart Towns Mission of the Indian government wants to build 100 smart towns across the country. This will bring in a lot of money for infrastructure and building projects. The Indian government has also started several other projects, such as the Pradhan Mantri Awas Yojana (PMAY), which aims to give everyone a good place to live, and the Sagarmala Project, which aims to improve India's maritime industry, which will increase demand for industrial fasteners.



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EEPC INDIA PLAYS A SIGNIFICANT ROLE IN ENGINEERING EXPORTS

INDIA'S ENGINEERING EXPORTS AT RECORD HIGH IN 2024-25

DESPITE A DISMAL GLOBAL TRADE AND ECONOMIC SITUATION

HIGHLIGHTS

India's Engineering exports reached an all-time high of US\$116.67 billion in 2024-25, marking a significant increase from US\$109.3 billion recorded in 2023-24.

(As per data released by the Ministry of Commerce and Industry, Government of India)

The global trade order is undergoing a major change ever since US President Donald Trump assumed office early this year and imposed tariffs on dozens of its trade partners. The world is facing massive disruption. The overall trade and global economic scenario remains volatile and uncertain. Mr Pankaj Chadha, Chairman, EEPIC India spoke on annual trade data 2024-25: “Despite this and other back-to-back challenges stemming from geopolitical tensions, the Indian engineering exports sector has displayed immense resilience.”

Indeed, it is worth noting that engineering goods shipments have recorded 6.74% year-on-year growth in fiscal 2024-25 over the last year. As per data released by the Ministry of Commerce and Industry, India’s Engineering exports reached an all-time high of US\$116.67 billion in 2024-25, marking a significant increase from US\$109.3 billion recorded in 2023-24.

As a result of the combined efforts of the exporting community and the support of the government, the engineering exports sector has managed to perform well against all odds.

The additional duties imposed by the US on iron & steel and auto components are set to hit the engineering exports sector. There could be a potential annual drop of US\$4-5 billion in engineering shipments to the US as a consequence of it. Besides, we are going to face massive competition from China in other markets as they vehemently push their products there as they chase new regions to de-risk the US.

Competition in markets like Latin America, Central America, the Middle East, and Africa is set to heat up as exporters explore new markets and further penetrate the existing ones. This could dent profit margins, leaving little funds for investment. At this juncture, we need constant support from the government, both fiscally and for making inroads in new markets.

The impact of the ongoing trade tariff war is, however, already visible. In March this year, the value of Indian engineering goods exports declined nearly 4% year-on-year to US\$10.82 billion as compared to US\$ 11.27 billion in the same month last year.



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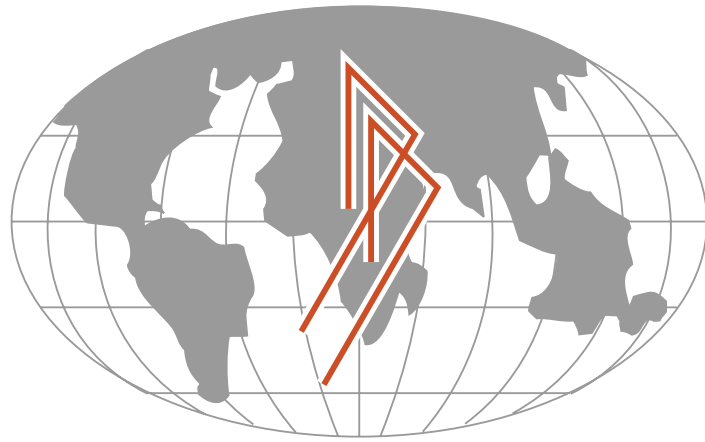
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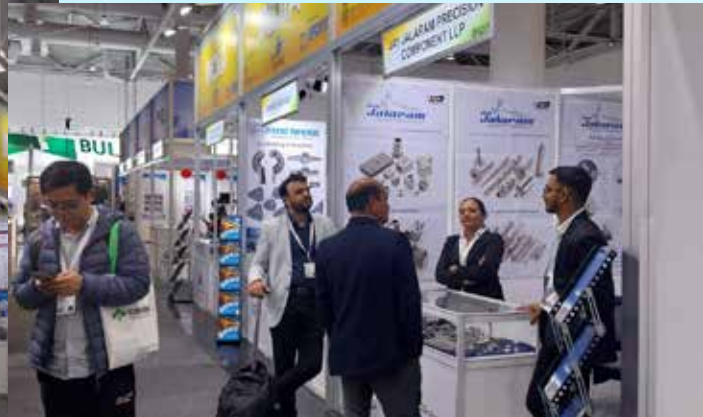
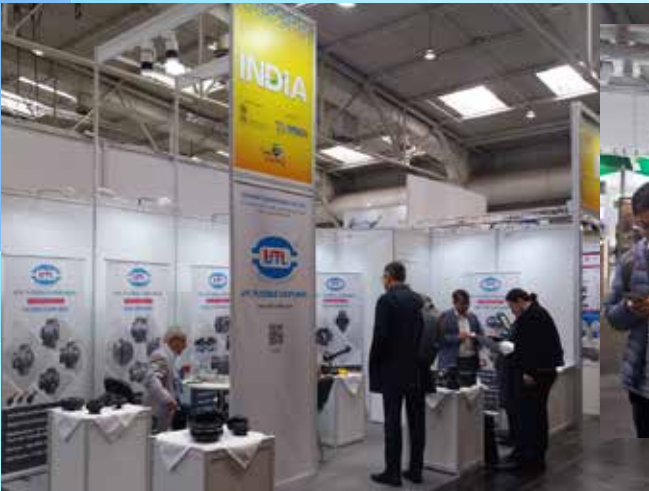
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Ms. Kerstin Jorna, Director General - Directorate General Internal Market, Industry, Entrepreneurship and SMEs (DG GROW), European Commission at EEPC India Booth



Mr. Rajesh Nath, Managing Director, VDMA India Services and Mr. Sandip Roy, VDMA India Services at EEPC INDIA Booth



Delegation from FII - Federation of Industries of India led by its Chairman Mr BalchandraSinh RaoRane (fourth from right)

OMAN DELEGATES MEET

20 MARCH | EEPC INDIA RO, DELHI



From the extreme left: Abdul Jalil Algimi (Business Gateway), followed by Rakesh Suraj, Regional Director (NR), EEPC India.

At the center Abdul Rahman (STS Oman). To his right is Sultan Sharyani (Masar Petroleum), followed by Omar Alnasser (Arabian Industries).

On the extreme right is Sanjay Kumar (Business Gateway).

GUNVATTA YATRA

AWARENESS PROGRAM ON NABL ACCREDITATIONS & ITS BENEFITS
HELD ON
THURSDAY 20TH MARCH, 2025,
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During the session, Mr. Vishal, Joint Director, and Mr. Prince, Assistant Director, provided an overview of NABL accreditation and calibration processes. They explained how individuals can register with NABL and access in-house facilities, provided they have the necessary permissions. They also detailed the online process and the required documents for registration. Mr. Ajay Goswami, Deputy Regional Chairman, encouraged industry members to take advantage of this opportunity and mentioned that anyone needing assistance can reach out to the EEPC INDIA office. Mr. Gaurav Gupta gave an update on upcoming EEPC INDIA events and urged participants to fully benefit from these sessions by attending them.

EMERGING OPPORTUNITIES IN NEW TECHNOLOGIES FOR ENGINEERING MANUFACTURING AND EXPORTS

24 MARCH 2025 | TAMARIND HOTEL, INDIA HABITAT CENTRE, NEW DELHI



The Guest speakers from L: Mr Kishore K Menon, Dy Director (Technical), National Institute of Solar Energy, Gurugram (2nd from left), Dr B K Panigrahi, Former Head & Currently Faculty, Centre for Automotive Research and Tribology, IIT Delhi (3rd from left), Dr Ved Varun Agrawal, Principal Scientist, CSIR- National Physical Laboratory, Delhi (4th) , Dr Vandana Kalia, Scientist-F DSIR (Department of Scientific and Industrial Research), Ministry of Science and Technology, Government of India (6th) , Dr Shailendra K Saroj, Chairman, IFEVA (International Federation of Electric Vehicle Association) (7th), Mr. Rakesh Bhatia, Sr. Business Development Advisor, AiMeD Secretariat (Association of Indian Manufacturers of Medical Devices) (8th),

EEPC India was represented by: Mr Pradeep K Aggarwal, Regional Chairman (NR) (5th from left) , Ms Pallavi Saha, Joint Director (far left)



Mr. Rakesh Bhatia, Sr. Business Development Advisor, AiMeD Secretariat (Association of Indian Manufacturers of Medical Devices)



Dr B K Panigrahi, Former Head & Currently Faculty, Centre for Automotive Research and Tribology, IIT Delhi

EMERGING OPPORTUNITIES IN NEW TECHNOLOGIES FOR ENGINEERING MANUFACTURING AND EXPORTS



Dr Ved Varun Agrawal, Principal Scientist, CSIR- National Physical Laboratory, Delhi



Mr Kishore K Menon, Dy Director (Technical), National Institute of Solar Energy, Gurugram



Dr Shailendra K Saroj, Chairman, IFEVA (International Federation of Electric Vehicle Association)



Dr Vandana Kalia, Scientist-F DSIR (Department of Scientific and Industrial Research), Ministry of Science and Technology, Government of India



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ENGINEERING TRADE ANALYSIS

■ FOR FEBRUARY 2025 ■

In February 2025, India's engineering exports declined year-on-year after nine months of growth run

Trade Flow	Export figures (in US\$ billion)				Growth (%)	
	Feb-2024	Feb-2025	Apr - Feb 2023-24	Apr - Feb 2024-25	Feb-2025 over Feb-2024	Apr-Feb 2024-25 over Apr-Feb 2023-24
Engineering exports	9.94	9.08	98.03	105.85	-8.62%	7.97%
Overall merchandise exports	41.41	36.91	395.38	395.63	-10.85%	0.06%
Share of engineering (%)	24.00%	24.61%	24.79%	26.75%	---	---
Service Exports	28.33	35.03	311.05	354.90	23.65%	14.10%

Source: Compiled from data by DGCI&S and Quick Estimates published by the Government of India.

The nine-month long growth run of India's engineering exports came to a halt in February 2025 with a decline in monthly shipment for the first time after April 2024 on a year-on-year basis. During February 2025, engineering exports from India was recorded at USD 9,082.61 million as against a higher USD 9,938.92 million in the same month last fiscal, conceding 8.62 percent decline. Cumulative growth as a consequence has also moderated to 7.97% but the possibility of achieving a new all-time high engineering exports in 2024-25 is almost certain. The year-on-year decline in February 2025 was mainly driven

by 58 percent decline in exports of Aluminium and Products and 40 percent decline in exports of Iron and Steel. Exports of 'Ships, Boats and Floating Structures' and 'Aircraft, spacecrafts and parts' also recorded noticeable decline in year-on-year exports during February 2025. Among the destination regions, significant year-on-year decline in shipments was witnessed in ASEAN, EU and North-East Asia while exports to WANA and Latin America also declined in February 2025. Exports to South Asia, Sub-Saharan Africa, CIS and North America however managed decent growth over February 2024.

HIGHLIGHTS

- After a nine-month long stretch of growth run, Indian engineering exports declined in February 2025 on a year-on-year basis, the second monthly decline in this fiscal after April 2024. February 2025 saw engineering exports dropped to USD 9,082.61 million from USD 9,938.92 million in the same month last fiscal, conceding a decline of 8.62 percent.
- On a cumulative basis however, engineering exports is on the growth path. During April-February 2024-25, engineering exports stood at USD 105,845.12 million as against USD 98,034.28 million during the same period of the last fiscal, registering a growth of 7.97 percent.
- According to the Quick Estimates of Department of Commerce, Government of India, share of engineering in India's total merchandise exports was recorded at 24.61 percent in February 2025 as against 25.86 percent in January 2025. On a cumulative basis, the share was recorded at 26.75 percent during April-February 2024-25.
- In February 2025, 21 out of 34 engineering panels witnessed positive year-on-year growth. While 13 engineering panels including mainly Iron and Steel and products, Copper, Aluminium and Tin products, Auto components and parts, Aircrafts and Spacecrafts, Ship and Boats, etc witness decline in exports during February 2025 vis-à-vis February 2024.
- On a cumulative basis, 28 out of 34 engineering panels recorded positive growth and remaining 6 engineering panels including Iron and Steel, some non-ferrous sectors including Copper, Aluminium and Zinc products, Office Equipment and Mica Products recorded negative growth during April-February 2024-25.
- Region wise, North America maintained its spot as the number one export destination with a share of 20.4% followed by EU (17.2%) and WANA (16.8%) in February 2025. Significant export growth was noted in South Asia (25.1%), SSA (9.7%), Other Europe (5.5%), in February 2025. In cumulative terms, all regions experienced growth barring Oceania (-11.3%) and EU (-0.2%).
- Country-wise, USA remained the top destinations followed by UAE and Saudi Arabia in February 2025 while maximum increase was noted in France (67%), UAE (37.9%) and UK (31.9%).
- In cumulative terms too USA remained the number one destination. Significant export growth was noted in UAE, Singapore, Nepal, Japan and France.



Overall Engineering Exports vs Engineering Exports Excluding Steel Segment

(Values in USD Million)

Trade Flow	Export in Feb 2024	Exports in Feb 2025	Growth (%)	Exports in Apr-Feb 2023-24	Exports in Apr-Feb 2024-25	Growth (%)
Overall engineering exports	9938.92	9082.61	-8.62	98034.28	105845.12	7.97
Engineering exports excluding Iron and Steel	8783.38	8393.89	-4.43	87332.25	97404.19	11.53

Source: DGCI&S, Govt. of India

OBSERVATIONS: Excluding the export of iron and steel, engineering exports recorded a lower year-on-year decline on a monthly and a higher year-on-year growth on a cumulative basis as exports of Iron and Steel declined substantially on both estimates. In February 2025, exports of Iron and Steel declined by 40 percent while on a cumulative basis, the decline was 21.1 percent year-on-year. Drop in Iron and Steel exports adversely impacted the overall engineering exports by around 4 percent.

ENGINEERING EXPORTS: MONTHLY TREND

The monthly engineering figures for 2024-25 vis-à-vis 2023-24 are shown below as per the latest DGCI&S estimates:



Table 1: Engineering Exports: Monthly Trend in 2024-25

(Values in USD Million)

Month	2023-24	2024-25	Growth (%)
April	8949.36	8547.86	-4.49
May	9300.62	9991.25	7.43
June	8515.72	9389.75	10.26
April-June	26765.71	27928.87	4.35
July	8720.30	9166.47	5.12
August	9048.65	9435.53	4.28
September	8886.54	9824.32	10.55
July-September	26655.49	28426.32	6.64
October	8078.48	11251.17	39.27
November	7822.25	8895.53	13.72
December	10007.56	10840.80	8.33
October-December	25908.29	30987.50	19.60
January	8765.87	9419.81	7.46
February	9938.92	9082.61	-8.62
April-February	98034.28	105845.12	7.97

Source: DGCI&S, Govt. of India

TOP 25 ENGINEERING EXPORT DESTINATIONS IN FEBRUARY 2025

We now look at the export scenario of the top 25 nations that had highest demand for Indian engineering products during February 2025 over February 2024 as well as in cumulative terms during April-February

2024-25 vis-à-vis April-February 2023-24. The data clearly shows that top 25 countries contribute 75.2% of total engineering exports.

Table 2: Engineering exports country-wise (Values in US\$ million)

Country	Feb-24	Feb-25	Growth (%)	Apr'23 - Feb'24	Apr'24 - Feb'25	Growth (%)
U S A	1569.50	1660.79	5.8%	15952.4	17271.8	8.3%
UAE	499.14	688.18	37.9%	5226.5	7560.8	44.7%
SAUDI ARABIA	591.49	323.26	-45.3%	4627.9	5184.0	12.0%
SINGAPORE	403.22	198.64	-50.7%	3048.2	4134.6	35.6%
GERMANY	366.26	340.26	-7.1%	3739.6	3832.6	2.5%
U K	246.20	324.74	31.9%	3269.2	3583.4	9.6%
MEXICO	311.31	275.97	-11.4%	2949.0	3221.7	9.2%
TURKEY	229.35	183.00	-20.2%	2503.4	2791.3	11.5%
ITALY	478.40	240.95	-49.6%	3519.8	2727.4	-22.5%
CHINA	235.39	207.45	-11.9%	2385.0	2451.3	2.8%
KOREA RP	330.44	224.95	-31.9%	2535.7	2335.0	-7.9%
SOUTH AFRICA	146.91	184.27	25.4%	1940.2	2292.5	18.2%
FRANCE	129.43	216.10	67.0%	1810.3	2288.2	26.4%
JAPAN	211.71	239.36	13.1%	1759.7	2226.3	26.5%
NEPAL	147.54	179.47	21.6%	1901.4	2029.0	6.7%
BRAZIL	202.95	175.94	-13.3%	1885.4	2021.2	7.2%
BANGLADESH	162.24	202.13	24.6%	1968.7	1972.8	0.2%
THAILAND	152.20	168.51	10.7%	1701.1	1823.5	7.2%
INDONESIA	136.67	122.44	-10.4%	2216.0	1808.2	-18.4%
NETHERLAND	164.23	152.08	-7.4%	1723.0	1733.0	0.6%
MALAYSIA	271.75	80.93	-70.2%	1900.8	1331.4	-30.0%
VIETNAM	152.22	98.99	-35.0%	1162.3	1296.0	11.5%
SPAIN	201.49	97.59	-51.6%	1441.2	1273.3	-11.7%
BELGIUM	171.50	97.44	-43.2%	1543.9	1254.1	-18.8%
RUSSIA	120.12	108.97	-9.3%	1224.1	1149.4	-6.1%
Total engineering exports to the top 25 countries	7631.68	6792.41	-11.0%	73934.81	79592.94	7.7%
India's total engineering exports	9938.92	9082.61	-8.6%	98034.3	105845.1	8.0%
Share % of Top 25 destinations	76.8%	74.8%		75.4%	75.2%	

Source: DGC&S

REGION WISE INDIA'S ENGINEERING EXPORTS

The following table depicts region wise India's engineering exports for April-February 2025 as compared to April-February 2024

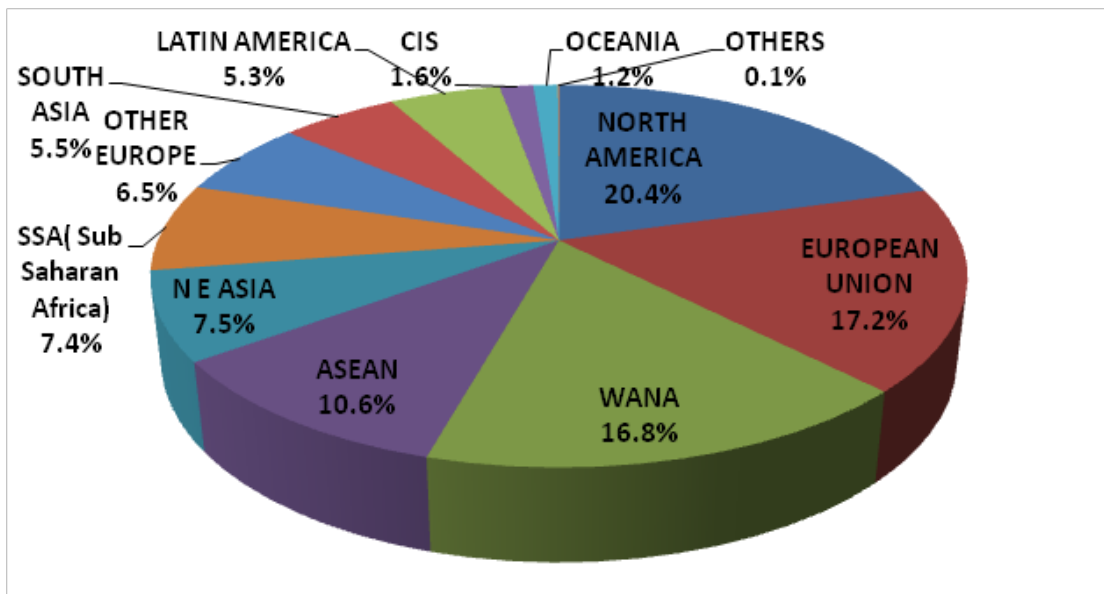
Table 3: Region wise engineering exports in April-February 2024-25 vis-à-vis April-February 2023-24

Region	Feb-24	Feb-25	Growth (%)	Apr'23 - Feb'24	Apr'24 - Feb'25	Growth (%)
NORTH AMERICA	1992.47	2033.54	2.1%	19987.13	21606.41	8.1%
EUROPEAN UNION	2008.45	1614.71	-19.6%	18225.23	18180.24	-0.2%
WANA	1585.91	1476.92	-6.9%	14624.06	17748.04	21.4%
ASEAN	1174.82	731.67	-37.7%	10757.89	11249.90	4.6%
N E ASIA	863.25	766.20	-11.2%	7508.67	7919.49	5.5%
SSA(Sub Saharan Africa)	617.04	677.00	9.7%	7181.00	7880.08	9.7%
OTHER EUROPE	502.24	529.84	5.5%	6092.76	6827.97	12.1%
SOUTH ASIA	424.42	531.02	25.1%	5506.89	5873.32	6.7%
LATIN AMERICA	503.90	465.50	-7.6%	5245.71	5584.01	6.4%
CIS	143.20	150.12	4.8%	1483.36	1683.78	13.5%
OCEANIA	120.37	97.83	-18.7%	1398.25	1231.67	-11.9%
OTHERS	2.85	8.26	189.5%	23.35	60.21	157.9%
Grand Total	9938.92	9082.61	-8.6%	98034.28	105845.12	8.0%

Source: DGCI&S

Note: Myanmar has been included in ASEAN and not in South Asia, since ASEAN is a formal economic grouping.

Figure 1: Region-wise shares of India's engineering exports during April-February 2024-25



Source: DGCI&S

PANEL WISE INDIA'S ENGINEERING EXPORTS

In this section we look at the Engineering Panel wise exports for the month of February 2025 vis-à-vis February 2024 as well as the cumulative exports for **April-February 2024-25 vis-à-vis April-February 2023-24**. These are indicated in the tables below.

Table 4: Panel-wise Export Analysis for April-February 2024-25 vis-à-vis April-February 2023-24

Product panels	February 2024	February 2025	Growth (%)	April-February 2023-24	April-February 2024-25	Growth (%)
Ferrous						
Iron and Steel	1155.54	688.72	-40.4%	10702.0	8440.9	-21.1%
Products of Iron and Steel	867.87	831.49	-4.2%	8898.1	9135.3	2.7%
Sub Total	2023.4	1520.2	-25%	19600.1	17576.2	-10%
Non-ferrous						
Copper and products	225.1	171.7	-24%	2283.1	2115.4	-7%
Aluminium and products	1175.0	494.7	-58%	7103.5	6235.2	-12%
Zinc and products	42.5	57.9	36%	680.5	675.9	-1%
Nickel and products	10.3	16.5	60%	147.1	169.4	15%
Lead and products	78.1	93.5	20%	679.4	836.7	23%
Tin and products	1.5	1.0	-32%	14.2	19.6	38%
Other Non-Ferrous Metals	68.3	71.1	4%	677.7	784.4	16%
Sub Total	1600.8	906.4	-43%	11585.5	10836.6	-6%
Industrial Machinery						
Industrial Machinery like Boilers, parts, etc.	74.3	73.6	-1%	657.2	750.4	14%
IC Engines and Parts	305.9	344.2	13%	3298.5	3485.2	6%
Pumps of all types	114.0	124.2	9%	1230.1	1407.2	14%
Air condition and Refrigerators	149.8	164.4	10%	1537.9	1744.5	13%
Industrial Machinery for dairy, food processing, textiles etc.	658.8	687.2	4%	7247.0	7461.3	3%
Machine Tools	71.8	72.3	1%	708.5	724.4	2%
Machinery for Injecting moulding, valves and ATMs	229.3	241.8	5%	2270.4	2557.0	13%
Sub Total	1603.7	1707.8	6%	16949.7	18130.0	7%
Electrical Machinery						
Electrical Machinery	979.7	1224.3	25%	11169.2	12997.2	16%
Automobile and auto component						
Motor Vehicle/cars	600.6	717.2	19%	7512.9	8093.2	8%
Two and Three Wheelers	264.0	266.0	1%	2469.9	2903.2	18%
Auto Components/Part	676.1	654.2	-3%	6964.5	7399.4	6%
Auto Tyres and Tubes	270.8	236.5	-13%	2605.7	2781.4	7%
Sub Total	1811.5	1873.9	3%	19553.0	21177.2	8.3%
Aircrafts and related products						
Aircrafts and Spacecraft parts and products	383.8	339.0	-12%	2348.5	6711.8	186%

Product panels	January 2024	January 2025	Growth (%)	April-January 2023-24	April-January 2024-25	Growth (%)
Ships Boats and Floating products and parts						
Ships Boats and Floating products and parts	338.7	222.5	-34%	3583.6	4042.5	13%
Miscellaneous engineering products						
Medical and Scientific instruments	186.7	218.5	17%	2181.6	2510.2	15%
Railway Transport	18.1	22.2	23%	291.0	329.0	13%
Hand Tools & Cutting Tools	79.5	81.0	2%	837.5	941.6	12%
Bicycle & Parts	31.8	36.3	14%	327.8	363.9	11%
Cranes Lifts & Winches	90.9	86.0	-5%	948.4	980.0	3%
Office Equipment	18.7	19.7	5%	281.3	256.1	-9%
Other Construction Machinery	253.8	258.3	2%	2701.3	2726.4	1%
Prime Mica & Mica Products	2.6	2.2	-18%	33.8	28.1	-17%
Project Goods	0.2	5.8	3047%	2.5	7.9	213%
Other Rubber Product Except Footwear	140.9	136.8	-3%	1515.2	1606.8	6%
Other Misc. Items	374.0	421.8	13%	4124.4	4623.5	12%
Total engineering exports	9938.9	9082.6	-8.6%	98034.3	105845.1	7.97%

Reasons for Decline (As per April-February 2024-25):

1. Iron and Steel : Insights

- During April-February 2024-25, India’s exports of Iron and Steel deteriorated by 21% vis-à-vis same period last fiscal, while Products of Iron and Steel witnessed growth to the extent of 3% during the same period, after continuous decline for many months. However in the month of February 2025, both Iron and Steel as well as Products of Iron and Steel witnessed decline in exports to the extent of 40% and 4% respectively.
- **US Tariffs:** The 25% tariffs imposed by the US on steel imports (as per the proclamation order dated on 18th February 2025) have created a challenging environment for Indian steel exporters. Although India’s direct steel exports to the US are relatively low, the tariffs have led to increased global competition and price pressures. The tariffs have also resulted in a shift in trade flows.
- **Market Sentiment and Trade Policies:** Uncertain-

ty around trade policies and potential trade wars has led to cautious buying behavior and delayed purchasing decisions. Protective measures by other countries, such as antidumping duties and safeguard measures, have also restricted India’s steel exports.

- **Impact of US Tariffs on India’s Steel Exports:** (i) While the direct impact of US tariffs on India’s steel exports is limited due to the low volume of exports to the US, the indirect effects are significant. The tariffs have led to increased global competition and price pressures, affecting India’s export competitiveness. (ii) On the other hand, India has proposed a 12% safeguard duty on a broad range of steel products to protect its domestic market from increased imports, This move aims to prevent a flood of cheap steel imports from disrupting the local industry. The safeguard duties will be in place for 200 days, pending a final decision. *In this regard, EEPC India urges a balanced*

approach to safeguard duty to protect MSMEs and user industries from potential price hikes and supply disruptions.

• **Overall price scenario in various countries post imposition of US tariff:**

- **US:** The US imposed a 25% tariff on all steel imports, which has significantly boosted domestic steel prices. Hot-rolled coil (HRC) prices soared, with the Midwest HRC price averaging \$807 per short ton in February, up from \$698 in January. The tariffs have led to increased demand for domestic steel, extending delivery lead times and pushing up prices further. (Source: SPG Platts Connet)
- **China:** The Chinese steel market experienced muted sentiment due to the US tariffs. Steel prices have remained relatively flat, with hot-rolled coil prices averaging 3,419 yuan per metric ton in February 2025. The tariffs have created uncertainty, leading to cautious buying behavior and concerns about a potential trade war. (Source: SPG Platts Connet)
- **European Union:** EU flat steel prices have risen due to expectations of tighter import quotas in response to the US tariffs and improving manufacturing activity. Northern EU flat steel prices reached a six-month high of €615 per metric ton in early March 2025. (Source: SPG Platts Connet)
- **Turkey:** Turkey's scrap prices have strengthened due to higher US steel and scrap prices. However, slow rebar sales have capped further gains.
- **India:** The imposition of a 25% tariff on steel imports by the US has led to significant shifts in global trade flows, with Asian exporters redirecting shipments to India. This has increased import pressure on the Indian market, affecting domestic steel prices and earnings. Despite the minimal direct impact due to low export volumes to the US, the increased competition and price pressures from redirected shipments have led to fluctuations in India's steel prices. For instance, hot-rolled coil (HRC) prices rose by 3% month-on-month in February 2025, driven by hopes of safeguard duties and reduced import volumes. (Source: BigMint).

2. Non- Ferrous Sector (Copper, Aluminium and Zinc)

Copper:

- **India's growing copper demand and its position as a net importer in Copper:** India's copper demand has been on the rise driven by requirement of clean energy systems and increasing penetration of electric vehicles. The domestic demand for copper is expected to double by 2030. India has turned into a net importer of copper since the closure of Vedanta's Sterlite copper plant in Tamil Nadu's Tuticorin in 2018. The country's demand for copper is also indicated by the fact that many new companies are venturing into copper production in India – for instance JSW now plans to set up its own smelter facility in Odisha with an investment of around 120 billion rupees and scale up the capacity to 1 million metric tons by 2033 or 34. The Adani Group has also set up a \$1.2 billion copper smelter in Gujarat.
- **Surplus in the global copper market:** As per S&P Global's forecast, the refined copper market is going to experience a surplus for 2025. Many new countries including non-producers such as Saudi Arabia are also joining the production trend. However, the copper concentrate market is expected to face deficits due to scant supply. India is dependent on imports for its supply of copper concentrates and there is a 2.5% tariff. The industry has urged the government to reduce the tariff to zero to facilitate import.

Aluminium:

- RODTEP benefit to SEZ units was only provided in October, November and December 2024 although the scheme was implemented from April 2024 for entire financial year. This is making exports unviable, and not competitive.
- Exports to USA are reducing year on year majorly because of not getting exemption from Section 232 duty, over and above not getting rodtep benefit for SEZ.

Zinc:

As per latest reports, there is a global oversupply of Zinc which has also affected its global prices.

ENGINEERING EXPORTS STATE-WISE ANALYSIS

State wise engineering export performance

The table below indicates the exports from top Indian states. It is evident from the table that almost 94.7 % of India's exports is contributed by the listed 12 states. Within this almost 56.5 percent of exports is done by Maharashtra, Tamil Nadu and Gujarat together.

Table 5:Top state wise engineering export performance – April-December 2024-25 (Values in USD Million)

Top States	April-December 2023-24	April-December 2024-25	Growth%	%Share in India's Eng Export	Remarks
Maharashtra	16907.0	16570.0	-2.0%	22.1%	94.7% share covered by top 12 states
Tamil Nadu	12586.9	13340.9	6.0%	17.8%	
Gujarat	10703.9	12472.9	16.5%	16.6%	
Telangana	1703.7	6191.6	263.4%	8.3%	
Karnataka	4958.1	5270.7	6.3%	7.0%	
Odisha	4910.7	4407.2	-10.3%	5.9%	
Andhra Pradesh	3671.9	3510.7	-4.4%	4.7%	
Uttar Pradesh	3102.2	3211.1	3.5%	4.3%	
West Bengal	2349.3	2592.5	10.4%	3.5%	
Madhya Pradesh	1368.8	1448.2	5.8%	1.9%	
Rajasthan	2414.2	1046.5	-56.7%	1.4%	
Daman & Diu And Dadra & Nagar Haveli	1108.1	938.5	-15.3%	1.3%	

Source: NIRYAT portal

- Top 12 states constitute over 94.7 % of India's engineering Exports. Once again, Karnataka maintained its 5th position, Telangana retained its 4th position, Odisha maintaining its 6th position,while Daman and Diu moved up to 12th position and Haryana moved further down to 13th position during the fiscal April-December 2024-25 compared to the same period last fiscal.
- Major negative growth witnessed in states like Maharashtra, Odisha, Andhra Pradesh, Rajasthan and Daman and Diu during April-Dec 2024-25 compared to the same period last fiscal.
- Maharashtra being the highest state in terms of Engineering Goods exports (constituting a share of 22.1%) is leading by US\$ 3229.1 million from Tamil Nadu(Second Highest State) for the period of April-Dec 2024-25

INDIA'S REGION WISE ENGINEERING EXPORTS

In terms of region, western region which includes industrial states like Maharashtra and Gujarat is the front runner in terms of exports with 38.7 percent share. Tamil Nadu from the Southern Region has retained its export performance and it ranked second after Maharashtra, while Gujarat and Telangana ranked third and fourth during April-December 2024-25.

Table 6: Region wise exports from India

(Values in USD Million)

Region	April-Dec 2023-24	April-Dec 2024-25	Growth%
EASTERN REGION	8651.2	8282.5	-4.3%
NORTHERN REGION	16713.3	5920.1	-64.6%
SOUTHERN REGION	23784.5	29053.9	22.2%
WESTERN REGION	30350.6	31734.5	4.6%

Source: NIRYAT portal

Note: The total engineering exports given in the above table is taken from NIRYAT as per the latest available data and may not tally with the total engineering exports as given by DGCI&S.(Data sourced from Niryat portal. It is to be noted that state figures for January 2025 not yet updated)

CORRELATION BETWEEN MANUFACTURING PRODUCTION AND ENGINEERING EXPORTS

Engineering forms a considerable part of the broader manufacturing sector and the share of engineering production in overall manufacturing output is quite significant. As exports generally come from what is produced within a country, some correlation between manufacturing production growth and engineering export growth should exist. We briefly look at the trend in manufacturing growth as also engineering export growth to see if they move in tandem. It may be mentioned that manufacturing has 77.63% weightage in India's industrial production.

Engineering export growth and manufacturing output growth moved in the same direction in as many as nine out of twelve months in each of the fiscal years 2019-20 and 2020-21. During fiscal 2021-22, engineering export growth and

manufacturing growth moved in the same direction in seven out of twelve months while in each of fiscal 2022-23 and 2023-24, as many as 10 out of 12 months saw engineering exports and manufacturing output moved in the same direction.

The first two months of fiscal 2024-25 also saw manufacturing output growth and engineering exports growth moving in the same direction. April 2024 saw engineering exports declined from a growth in Mar 2024 and manufacturing output growth decelerated. The month of May 2024 witnessed just the opposite. Engineering exports bounced back to growth path and manufacturing output growth accelerated. Then June, July and August 2024 however saw both moved in the opposite direction. June and August 2024 saw higher engineering export growth but lower manufacturing growth in

comparison to the previous month while July 2024 just witnessed the reverse. September and October 2024 again saw both moving in the same direction by securing acceleration in growth. November 2024 however saw slowdown in engineering export growth but faster manufacturing growth vis-à-vis October 2024 while growth in both engineering exports and manufacturing output moderated in December 2024. In January 2025 once again, the direction was opposite as engineering exports growth moderated against a faster manufacturing output growth.

The link between these two may not be established monthly, but a positive correlation may be seen if medium to long term trend is considered.

Table 7: Engineering exports growth vis-à-vis manufacturing growth from April 2022

Months/ Year	Engg. Export Growth (%)	Manufacturing Growth (%)	Months/ Year	Engg. Export Growth (%)	Manufacturing Growth (%)
April 2023	-7.52	5.5	March 2024	10.66	5.9
May 2023	-4.25	6.3	April 2024	-4.49	4.2
June 2023	-11.12	3.5	May 2024	7.43	5.1
July 2023	-6.91	5.3	June 2024	10.26	3.5
August 2023	7.66	10.0	July 2024	5.12	4.7
September 2023	6.50	5.1	August 2024	4.28	1.2
October 2023	6.99	10.6	September 2024	10.55	4.0
November 2023	-3.48	1.3	October 2024	39.27	4.7
December 2023	9.82	4.6	November 2024	13.72	5.5
January 2024	4.20	3.6	December 2024	8.33	3.4
February 2024	15.90	4.9	January 2025	7.46	5.5

(Source: Department of Commerce and CSO)

IMPACT OF EXCHANGE RATE ON INDIA'S EXPORTS

How did the exchange rate fare during February 2025 and what was the recent trend in Re-Dollar movement? In order to get a clearer picture of the recent Re-Dollar trend, not only we took the exchange rate of February 2025, but also considered monthly average exchange rate of Rupee vis-à-vis the US Dollar for each month of fiscal 2023-24 and 2024-25 till February 2025 as per the latest data published, as mere one-month figure does not reflect any trend. The following two tables clearly depicts the short-term trend:

Table 8: USD-INR monthly average exchange rate in 2024-25 vis-à-vis 2023-24

(As per latest data released by FBIL)

Monthly Average Exchange Rate (1 USD to INR)			Year-on-Year Change (%)	Direction	Month-on-Month Change (%)	Direction
Month	2023-24	2024-25				
April	82.02	83.41	1.69	Depreciation	0.49	Depreciation
May	82.34	83.39	1.28	Depreciation	-0.02	Appreciation
June	82.23	83.47	1.51	Depreciation	0.10	Depreciation
July	82.15	83.59	1.75	Depreciation	0.14	Depreciation
August	82.79	83.89	1.33	Depreciation	0.36	Depreciation
September	83.05	83.81	0.92	Depreciation	-0.10	Appreciation
October	83.24	84.02	0.94	Depreciation	0.25	Depreciation
November	83.30	84.36	1.27	Depreciation	0.40	Depreciation
December	83.28	84.99	2.05	Depreciation	0.75	Depreciation
January	83.14	86.27	3.76	Depreciation	1.51	Depreciation
February	82.96	87.05	4.93	Depreciation	0.90	Depreciation

Rupee depreciated continued in February 2025: INR depreciated vis-à-vis the US Dollar by a higher 4.93 percent on a year-on-year basis in February 2025 in comparison to January 2025. On a month-on-month basis however, the depreciation was lower at 0.90 percent. Heavy FPI outflow from India, coupled with intensification of global trade war risks and uncertainty surrounding US trade policies led to the volatility in currency market and INR depreciation in February

2025. US Dollar gave up some gains due to this global uncertainty. As per the RBI report in March 2025, Rupee is still less volatile among its ASEAN peers.

Outlook: The weakening of rupee vis-à-vis the US Dollar is apprehended to persist at least in the first few months of 2025 but the impact of US trade decision on global economy may change the scenario going forward.



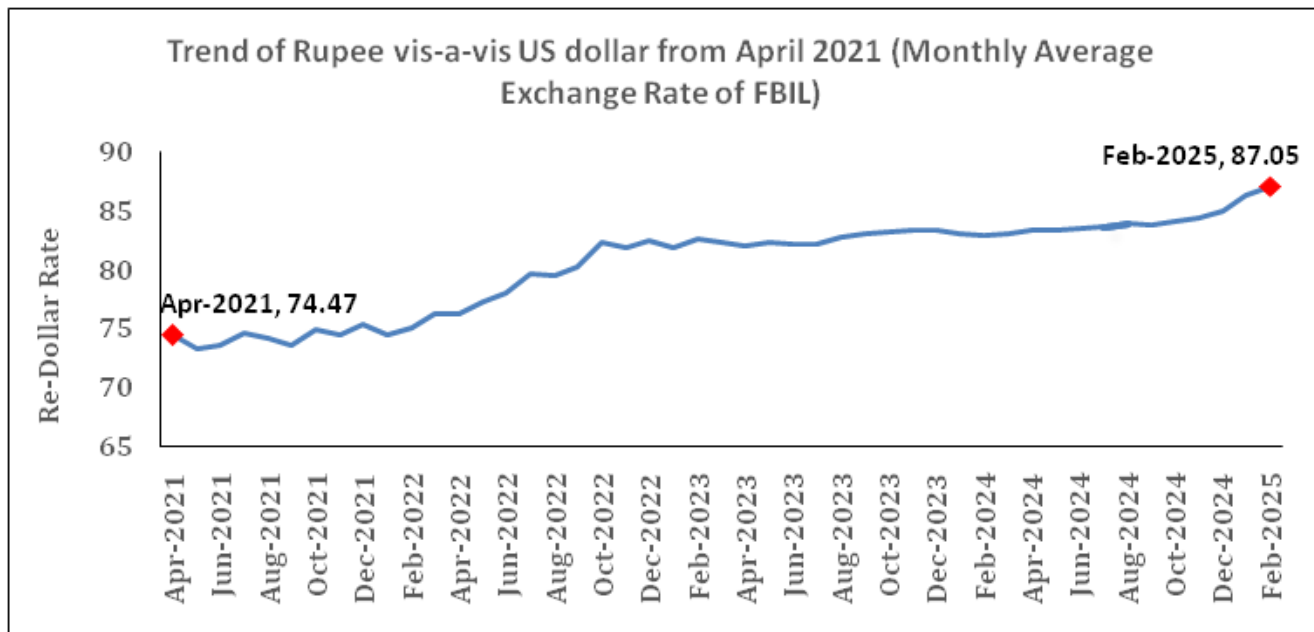
Table 9: USD-INR monthly average exchange rate in 2023-24 vis-à-vis 2022-23

(As per latest data released by FBIL)

Monthly Average Exchange Rate (1 USD to INR)			Year-on-Year Change (%)	Direction	Month-on-Month Change (%)	Direction
Month	2022-23	2023-24				
April	76.17	82.02	7.68	Depreciation	-0.33	Appreciation
May	77.32	82.34	6.49	Depreciation	0.39	Depreciation
June	78.04	82.23	5.37	Depreciation	-0.13	Appreciation
July	79.60	82.15	3.20	Depreciation	-0.10	Appreciation
August	79.56	82.79	4.06	Depreciation	0.78	Depreciation
September	80.23	83.04	3.50	Depreciation	0.30	Depreciation
October	82.34	83.24	1.09	Depreciation	0.24	Depreciation
November	81.81	83.30	1.82	Depreciation	0.07	Depreciation
December	82.46	83.28	0.99	Depreciation	-0.02	Appreciation
January	81.90	83.12	1.49	Depreciation	-0.19	Appreciation
February	82.61	82.96	0.42	Depreciation	-0.19	Appreciation
March	82.29	83.00	0.86	Depreciation	0.05	Depreciation

Fig 2: Trend of Rupee vis-a-vis US dollar from April 2020

(Monthly Average Rate of FBIL has been considered)



Source: FBIL



India's Engineering imports during February 2025 were valued at US\$12060.96million compared to US\$ 12694.65million in February 2024 registering a negative growth of 5.0 percent in dollar terms. Sectors like Non-Ferrous Metals, Electrical Machinery & Medicinal & Pharmaceutical products witnessed a rise in import during February 2025 compared to February 2024 registering positive growth over the same period while Iron & Steel, Machine Tools, Transport

Equipments&Professional instrument, Optical goods, etc. recorded a decline in growth during the same.

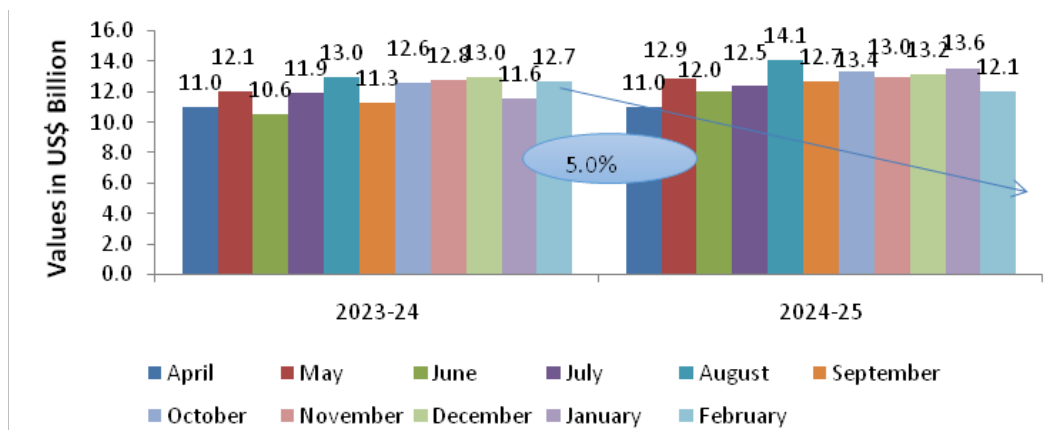
The share of engineering imports in India's total merchandise imports in February 2025 was estimated at 23.7 percent, higher than that of February 2024 which was estimated at 20.8 %. The figure below depicts engineering imports **for February 2025 compared to February 2024.**

Table 10: India's engineering imports in April-January 2024-25 vis-à-vis April-January 2023-24

Values in US\$ MN	February '23	February '24	Growth (%)	April-February '23	April-February '24	Growth (%)
India's Engineering Imports	12694.65	12060.96	-5.0%	132684.1	140382.2	5.8%

Source: Quick Estimates, MoC

Fig 3: Monthly Engineering Imports for April-February 2024-25 vis-a-vis April-February 2023-24



Source: EEPC India analysis

TREND IN ENGINEERING TRADE BALANCE

We now present the trend in two-way yearly trade for the engineering sector for the 2024-25 depicted in the table below:

Table 11: Monthly Trend in Engineering Trade Balance for the current FY 2024-25

(US\$ Billions)

Trade Flow	April	May	June	July	August	September	October	November	December	January	February
Engineering Export	8.7	10.0	9.4	9.0	9.4	9.8	11.2	8.9	10.8	9.4	9.1
Engineering Import	11.0	12.9	12.0	12.5	14.1	12.7	13.4	13.0	13.2	13.6	12.1
Trade Balance	-2.3	-2.9	-2.6	-3.5	-4.7	-2.9	-2.2	-4.1	-2.4	-4.2	-3.0

Source: DGCI&S, EEPC India Analysis

CONCLUSION

The tremendous performance of India's engineering exports with a nine-month growth run came to a halt in February 2025. The decline in exports in february 2025 was 8.62% as it reached USD 9.08 billion. Cumulative growth as a consequence has also moderated to 7.97% but the possibility of achieving a new all-time high engineering exports in 2024-25 is almost certain. The decline was majorly due to fall in metal exports especially for iron and steel, aluminium and copper.

The months of February and March of 2024-25 witnessed a major upheaval in the global trade - a result of the protective and retaliatory tariff measures adopted by the newly elected US President, Donald Trump. The Trump administration has threatened retaliatory tariffs on some of its major trade partners including China, Canada and Mexico. India has also not been spared as the President has called it a "High Tariff Nation", reiterating the need for reciprocal tariffs which are to be effective from 2nd of April 2025. The industry is bracing itself for two different impacts in case the tariffs become effective: firstly the loss of US market which is also the largest engineering export destination for India. Sec-

ondly, trade diversion that may happen due to this from China, Japan, South Korea or South East Asian nations.

Globally, trade experts are looking for way out of the on-going trade uncertainty. A recent report published by researchers in the London School of Economics indicated how recent US trade policies along with growing uncertainty fuelled by ongoing geopolitical disputes may bring significant economic and financial market disruptions. In India too, there is a need to diversify our export destinations and at the same time work out an agreement with the US which can lessen the impact of the above mentioned tariff. The Government of India is already on the right track in terms of diversifications as it signed new FTAs with UAE and Australia. New FTAs are also being negotiated with EU, UK and GCC. More such FTAs are required in Latin America and Africa. At the same time to protect our market in the US, Government of India is also contemplating a Bilateral Trade Agreement with the US. This is also a very significant step and we are hopeful that if implemented, this would go a long way in protecting our global markets.



ANNEXURE-I

ENGINEERING PRODUCT PANELS – COUNTRY-WISE ANALYSIS

We now analyze the performance of some of the important products for the fiscal April-February 2024-25 vis-à-vis April-February 2023-24. We have taken the major panels and computed the top importers to get an idea of the current trade pattern.

Engineering Product Panel - Country matrix

(US\$ Billions)

Product panels	Top 5 nations	April- February 2023-24	April- February 2024-25	Growth
Iron and Steel	Italy	1720.1	984.9	-43%
	Nepal	709.7	707.7	0%
	UAE	587.5	627.0	7%
	USA	449.1	516.7	15%
	UK	328.4	481.7	47%
Products of Iron and Steel	USA	2536.1	2790.1	10%
	UAE	525.9	775.4	47%
	Saudi Arab	484.4	523.7	8%
	Germany	402.9	418.6	4%
	UK	323.1	312.9	-3%
Industrial Machinery	USA	3368.6	3790.5	13%
	UAE	735.7	885.3	20%
	Germany	924.0	803.4	-13%
	China	636.4	784.5	23%
	Thailand	716.4	705.6	-2%
Automobiles (Motor Vehicles/Cars and Two and Three Wheelers)	USA	3368.6	3790.5	13%
	UAE	735.7	885.3	20%
	Germany	924.0	803.4	-13%
	China	636.4	784.5	23%
	Thailand	716.4	705.6	-2%

Engineering Product Panel - Country matrix

(US\$ Billions)

Product panels	Top 5 nations	April- February 2023-24	April- February 2024-25	Growth
Non-Ferrous metals	USA	1362.9	1360.7	0%
	Korea RP	1186.8	881.9	-26%
	Turkey	164.1	709.3	332%
	Saudi Arab	1065.2	690.8	-35%
	China	604.4	567.9	-6%
Electrical Machinery and Components	USA	2127.2	2469.9	16%
	Singapore	900.0	1405.4	56%
	UK	900.9	1047.7	16%
	Germany	676.8	886.0	31%
	Korea RP	418.1	601.3	44%
Aircrafts and Space crafts	UAE	254.9	1641.5	544%
	Saudi Arab	331.0	1113.8	236%
	France	182.5	720.4	295%
	USA	451.6	403.9	-11%
	Czech Republic	3.9	353.3	9012%
Ships, Boats and Floating Structures and parts	Singapore	953.6	1707.0	79%
	UAE	890.3	1030.3	16%
	Indonesia	569.3	306.4	-46%
	USA	52.9	306.4	479%
	Sri Lanka	346.8	236.6	-32%
Auto Components (including Auto Parts and Auto Tyre)	USA	2160.7	2141.5	-1%
	Brazil	459.7	551.1	20%
	Germany	531.3	546.8	3%
	Turkey	532.7	447.4	-16%
	Mexico	403.6	444.1	10%

Source: DG & S, IEPG India Analysis

Contd. to next page

FUTURE BUZZ

- In April-February 2024-25, Italy, Nepal and UAE ranked as the top importers of Indian Iron and Steel, while the USA, UAE and Saudi Arabia lead in import of 'Products of Iron & Steel.'
- The USA stood out as the primary importer of Indian 'Industrial machinery,' making up 21% of India's global exports in this category, followed by UAE 5% and Germany with 4% shares, respectively.
- Saudi Arabia, South Africa, Mexico and Japan were top importers of India's Automobiles during April-February 2024-25 in India's global exports respectively over April- February 2023-24.
- USA, South Korea and Turkey were the top three importers of India's Non-ferrous metals and products' during April- February 2024-25 whereas USA, Singapore, UK and Germany were the top importers of Indian Electrical Machinery & Components during the same period.
- UAE, Saudi Arabia, France and USA were the top importers of India's Aircrafts and Spacecraft during April-February 2024-25 in India's total global exports of the product.
- Singapore, UAE and Indonesia became the largest importer of ships, boats and floating structures followed by USA and Sri Lanka. While for the auto components' product group, USA remained the top importer in April-February 2024-25 followed by Brazil, Germany, Turkey and Mexico.

Disclaimer

The analysis in this write-up is prepared by the team at EEPIC India. The data used in this write-up is primarily sourced from the DGCI&S database and pertains to products under the purview of EEPIC India. Sources are cited where relevant. While every effort has been made to ensure the accuracy and reliability of the data and analysis, EEPIC India assumes no responsibility for any errors or decisions based on this information.



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Magirsha Industries Pvt. Ltd. (erstwhile Magirsha Industries), a company with 50 years' experience in design and manufacturing of pressure vessels, heat exchangers, distillation columns, reactors & storage tanks etc. under ASME, TEMA & IBR codes.

- MOC handled – Carbon steel, stainless steel & LTCS.
- Services include process design, mechanical design & manufacturing (under renowned TPI agencies like "tkIS, LRS, EIL, BV, TCE, TUV, IR Class, etc").
- We are ASME 'U' designated shop.
- Shop certified by EIL, tkIS and Toyo.
- ISO 9001:2015 certified since past 12 years.
- Regular exporter to Middle East countries.
- Supplied more than 5000 equipment to various clients in India and abroad.
- Selected by CNBC, TV18, in the category of "The International Trade Awards 2010-2011". We were amongst the top three nominated organizations in engineering field for its export achievements.
- Patented Item – Magirsha Jet Pump – Steam Operated Ejector for Dewatering Service.

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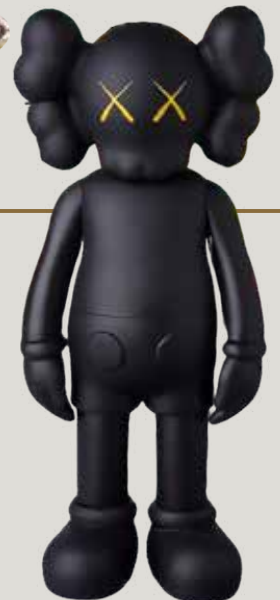
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SUSTAINABILITY WITH ARTIFICIAL INTELLIGENCE THE CRUCIAL NEED IN FOUNDRIES

DR BRIJESH AINAPUR AND BALAJI D LOGANATHAN



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ABSTRACT

As industries worldwide committed to reduce their carbon footprint, the foundry sector stands out as a key area where sustainability can make a significant impact on the environment. Integrating Artificial Intelligence (AI) into foundry operations offers advanced solutions to increase efficiency, increase profitability, reduce waste,

and promote eco-friendly practices. This article explores deeply into why AI is becoming essential for sustainable foundry operations and how it can transform the foundry industry for the better greener and eco-friendly organisation.

With modernisation and automation in the foundry processes, slowly foundry manpower requirements are

turning from unskilled many to skilled few. Foundry Industry has witnessed exponential growth both in terms of volumes and technology. With the advent of new technologies, foundry operations are becoming more reliable and sustainable. Sustainability and reducing carbon footprints using Artificial intelligence, a new technology that is gaining more and more importance, support mistake proofing, cost reduction, MIS preparation, global sustainability compliances and plugging manual errors in all areas. Visual AI in Melting Operations control, Weighbridge automation, Moulding and Post-production areas are a few examples discussed in this article that help in realising all the above-mentioned benefits.

■ INTRODUCTION

The Climate change refers to significant and lasting shifts in global or regional climate patterns, primarily marked by a rise in average global temperatures. This phenomenon poses serious environmental challenges and necessitates urgent action to mitigate its impacts on ecosystems and human societies.

With the introduction of the transition phase of the CBAM (Cross Border Adjustment Mechanism) tax from October 2023, it has become mandatory for all the exporters to the European Union to start measuring embedded carbon emissions for both installations and CBAM products. The Carbon Border Adjustment Mechanism (CBAM) is a carbon pricing system implemented by the European Union (EU) to combat carbon leakage and promote global climate action. It aims to put a fair price on the carbon emissions

embedded in certain goods imported into the EU, ensuring a level-playing field for EU producers who operate under the EU's Emissions Trading System (ETS).

Artificial intelligence (AI) is transforming manufacturing into a sustainable cost-effective unit by assisting the process in many areas:

- **Predictive maintenance:** AI systems will analyse data from all the equipments in furnaces, moulding machines, sand plant to predict when a part might fail or require maintenance. AI systems are integrated with the equipment PLC systems or data logger to collect the data and predict the results. This helps in reducing downtime and extending the lifespan of equipment.
- **Quality control:** AI-powered vision systems can inspect products for defects with high precision. If the human quality checks are missed, this can also be tracked with AI.
- **Supply chain optimisation:** AI systems will be interfaced with the plant ERP system, which helps in the continuous monitoring of demand, inventory levels, and also material inward/outward through our weighbridge automation on real-time basis.
- **Process automation:** AI enables automation of complex manufacturing processes. Robots and automated systems, guided by AI, can perform tasks like the complete, melting process - starting from charging of scrap to tapping of metal and pouring, assembly of cores, movement of cores, counting of castings from shakeout/shot blasting/fettling and



despatch with high accuracy and speed.

- **Energy management:** Visual AI with PLC interface can optimise energy consumption by analysing patterns and suggests adjustments to reduce power. This lowers costs and supports in reducing process

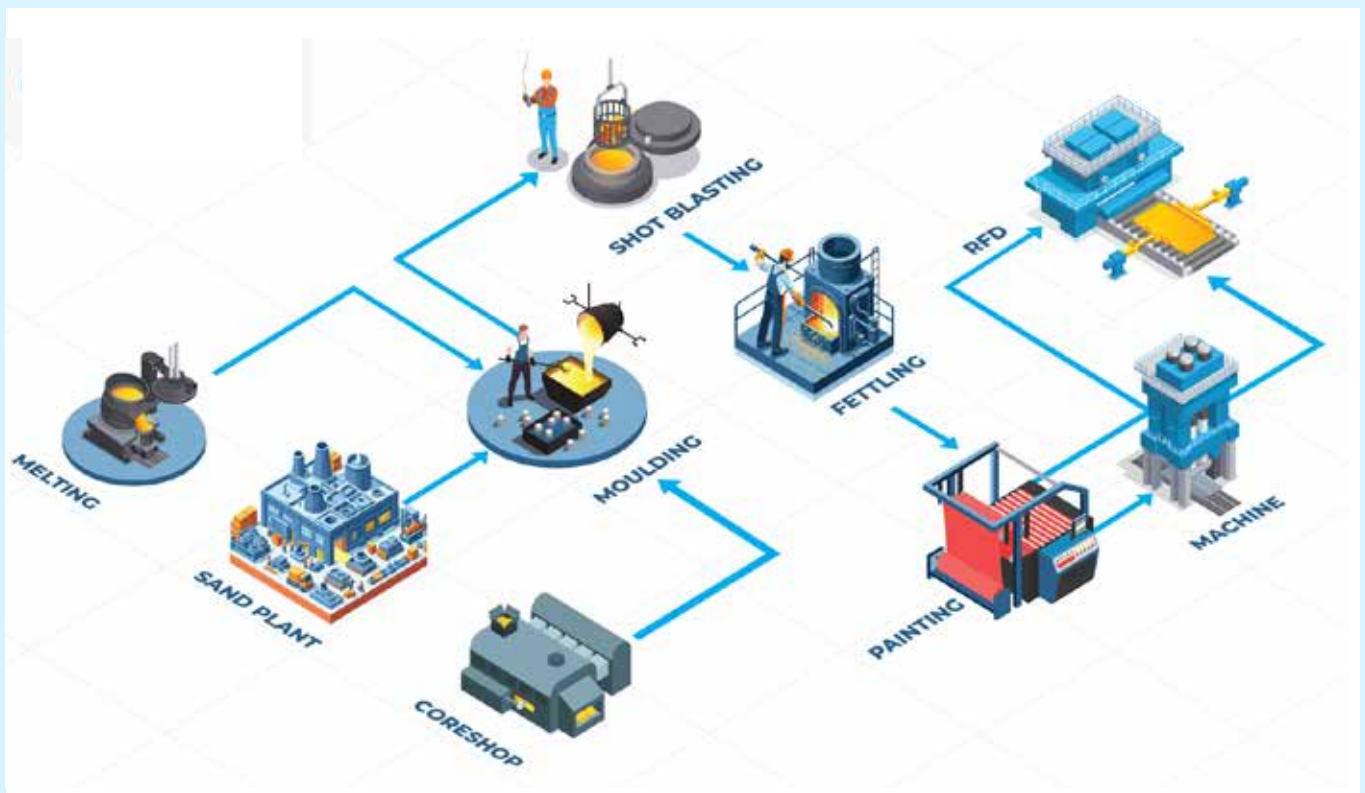
carbon footprint associated with the process and ensures sustainability efforts.

Overall, AI in manufacturing leads to reduced carbon footprint, increased efficiency, reduced costs, improved quality and greater flexibility. It's a key driver in the

APPLICATION IN THE FOUNDRY PROCESS

In order to achieve reduction in carbon footprint in foundry operations, one can utilise AI to derive at customer-specific solutions based on the foundry requirements.

Simple foundry operations process flow architecture is shown in Fig 1.



Melting, Sand Plant and Coreshop are sections where metal is melted, sand is prepared and cores are produced respectively for the moulding line. Sand is used for preparing the mould, cores are placed in the mould and metal is poured. Process parameters and emissions at each stage of production is calculated and recorded. AI utilises data from visual cameras, PLC systems of equipments and data loggers. All these calculations are based on GHG protocol and EPA protocols which

complies with the emission standards.

Implementation of AI system in melting operation is shown in Fig.2. All the operations of melting are tracked starting from charging scrap into furnace, temperature measurement, spectrometer sample checking and pouring along with real times associated with operations.



Summary report of each hour / shift / day / month can be easily retrieved and reports can be printed without relying on traditional log sheets. These outputs can also

be integrated with your ERP system for production and delays entry.

Summary Report View Detailed Report

All Furnace: 10/12/2023 - 10/12/2023 Filter

Show All entries Search: Refresh Download as Excel Download as PDF

Cycle No	Start Time	Total Energy kWh	Vibro Charging	Spectrometer Check	ATAS Check	Chemical Correction	Pyrometer Check	Deslagging	Tapping	Melting	Temperature °C	Weight Kg	End Time	Duration
SW20231218001	18-12-2023 11:12:24	0	1 Min 55 Secs	✓	✓	15 Secs	✓	✓	20 Secs	7 Mins 55 Secs	0	0	18-12-2023 11:20:38	8 Mins 14 Secs
SW20231218002	18-12-2023 12:46:40	0	3 Mins 29 Secs	✓	✓	15 Secs	✓	✓	15 Secs	8 Mins 29 Secs	0	0	18-12-2023 12:57:31	8 Mins 45 Secs
SW20231218003	18-12-2023 13:02:04	0	53 Secs	✓	✓	15 Secs	✓	✓	21 Secs	4 Mins 19 Secs	0	0	18-12-2023 13:06:44	4 Mins 40 Secs
SW20231218004	18-12-2023 13:08:18	0	1 Min 31 Secs	✓	✓	16 Secs	✓	✓	19 Secs	7 Mins 8 Secs	0	0	18-12-2023 13:15:44	7 Mins 26 Secs
SW20231218005	18-12-2023 13:16:37	0	2 Mins 38 Secs	✓	✓	15 Secs	✓	✓	1 Min 7 Secs	11 Mins 47 Secs	0	0	18-12-2023 13:29:32	12 Mins 55 Secs

Complete AI architecture ensures data security with 3-layer data protection system. Figure 3 shows how each stage of melting process is captured using the

most advanced AI solutions extended towards sustainability compliances with emissions measurement.

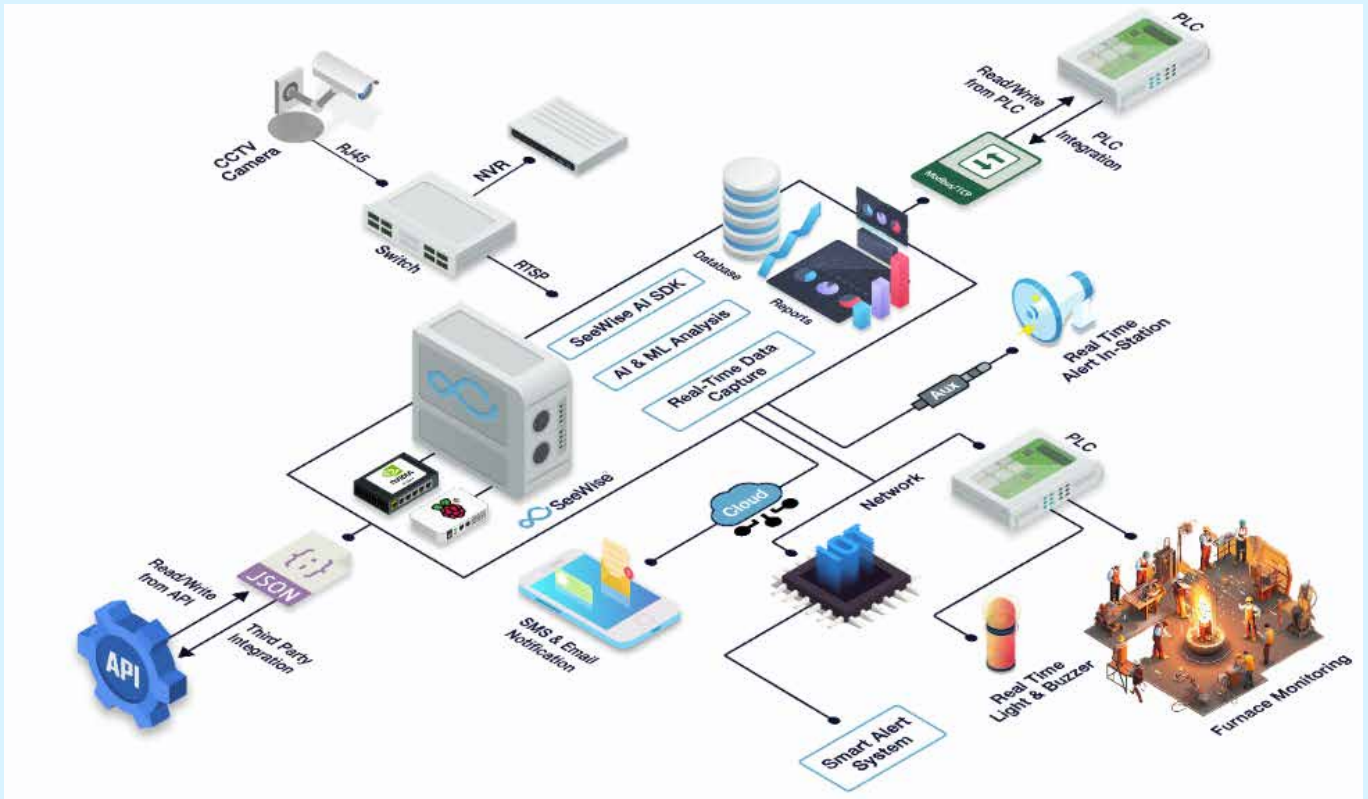


Fig 3: How each stage of melting process is captured using the most advanced AI solutions

CONCLUSION

With the complexity of foundry operations, measuring, monitoring and complying with each operation procedures is diverse in nature and effort has been put to completely do the automation using AI, which generates the production reports and sustainability compliance reports in one go. Becoming sustainability compliant is not an one-day affair, it is a long journey and let us start

this long journey today to own responsibility towards the next generations and planet earth. Sustainability is not only a concern of protecting the green, but also protecting our Business from International norms and Government compliances. Let's work together to make our foundry industry to become **Artificial Intelligence enabled Sustainability Compliant.**

Acknowledgement

1. Sustainability with Artificial Intelligence - The Crucial Need in Foundries (Page 32 of Indian Foundry Journal, September 2024 edition)

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EEPC INDIA CALENDAR OF EVENTS

All events subject to change

Name of the Event	Date	Place	Product sectors
EXPOMAFE 2025	6 - 10 May 2025	Sao Paulo, Brazil	Machine Tools, Industrial Automation
CWIEME 2025	3 - 5 June 2025	Berlin, Germany	Coil Winding, Transformer, Electric Motor, e-Mobility
JIMEX 2025	23 - 26 June 2025	Amman, Jordan	Electrical, Mechanical Machinery, Automation
SUBCON 2025	4 - 5 June 2025	Birmingham, UK	Subcontracting
EUROBIKE 2025	25 - 29 June 2025	Frankfurt, Germany	Bicycle And Future Mobility Industry
INNOPROM 2025	7 - 10 July 2025	Ekaterinburg, Russia	Industrial and Electrical machinery, Automobile & other construction machinery
INTERNATIONAL FASTENER EXPO 2025	15 -17 September 2025	Las Vegas, USA	All types of Fasteners, machinery for fasteners, wires
MSV BRNO 2025	7 - 10 October 2025	Brno, Czech Republic	Multiple Engineering Products
Gulf 4P and Mach & Tools 2025	1 - 4 December 2025	Dammam, Saudi Arabia	Industrial machinery, Tools & Equipment, Plastic, Printing, Packaging, Petrochemicals
Subcontract India 2025	6 - 8 November 2025	Pune	Subcontracting- Casting, Forging, Composite moulding & materials, Testing Equipment



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