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# LETTER BOX

## NOTIFICATIONS

### Notifications for May 2026

1. As per Trade Notice No. 03/2026-27 dated 13th May 2026, DGFT has issued clarifications regarding the Interest Subvention Support for Pre- and Post-Shipment Export Credit under the Export Promotion Mission - Niryat Protsahan. The Trade Notice provides guidance on the implementation and eligibility conditions of the interest subvention scheme, aimed at facilitating access to affordable export credit for exporters and enhancing their competitiveness in global markets. (Attachment enclosed - Trade Notice 03).
2. As per Trade Notice No. 08/2026-27 dated 08th May 2026, DGFT has issued instructions regarding the enlistment and updation of Pre-Shipment Inspection Agencies (PSIAs) and the addition of instruments for existing PSIAs in Appendix-2G under Para 2.52(c) of the Handbook of Procedure (HBP), 2023. The Trade Notice outlines the procedural framework for recognition, modification, and expansion of the scope of PSIAs to ensure quality compliance and facilitation of export certification requirements. (Attachment enclosed - Trade Notice 08).
3. As per Public Notice No. 10/2026-27 dated 11th May 2026, DGFT has issued an amendment to Appendix 2B [List of Agencies Authorised to issue Certificate of Origin (Preferential)] of the Foreign Trade Policy, 2023. The Trade Notice notifies changes in the list of designated agencies, aiming to streamline the issuance of Certificates of Origin and ensure greater efficiency and compliance in preferential trade documentation. (Attachment enclosed - Public Notice 10)
4. As per Public Notice No. 09/2026-27 dated 11th May 2026, DGFT has issued amendments in Para 2.88 and Para 2.91 of the Handbook of Procedures (HBP). The Trade Notice outlines the revised provisions to streamline procedures and improve clarity in the implementation of the concerned policy measures, ensuring better compliance and facilitation for stakeholders involved in foreign trade activities. (Attachment enclosed - Public Notice 09).
5. As per Public Notice No. 11/2026-27 dated 14th May 2026, DGFT has issued notification regarding the insertion of SION notes below SIONs M1 to M8. The Trade Notice provides clarity and additional guidance on the applicability and interpretation of these Standard Input Output Norms, aimed at ensuring uniformity and better compliance in export-import operations under the relevant product categories. (Attachment enclosed - Public Notice 11).
6. As per Public Notice No. 12/2026-27 dated 22nd May 2026, DGFT has notified the allocation of 8606 MTRV of raw cane sugar to the USA under the Tariff Rate Quota (TRQ) scheme for the US fiscal year 2026. The Public Notice outlines the quantity allocation mechanism and related procedural provisions to facilitate exports to the USA under the preferential quota arrangement, ensuring compliance with bilateral commitments. (Attachment enclosed - Public Notice 12)
7. As per Notification No 15/2026-27 dated 01st May 2026, DGFT has issued notification regarding the alignment of the RoDTEP Schedule consequent to changes in the First Schedule to the Customs Tariff Act, 1975, as amended vide the Fourth Schedule of the Finance Act (No. 3) of 2026. The Public Notice revises the Remission of Duties and Taxes on Exported Products (RoDTEP) rates for tariff lines, ensuring seamless alignment with the updated Customs Tariff structure and facilitating smooth implementation of export incentive benefits. (Attachment enclosed - RoDTEP Changes Notification ).



10

**SPOTLIGHT**



**ENGINEERING EXPORTS AT CROSSROADS:** NAVIGATING DEMAND AND SUPPLY-SIDE CHALLENGES IN A SHIFTING GLOBAL TRADE LANDSCAPE

36

**KALEIDOSCOPE**

58

**GO TECH**



**EUCBAM: WHAT IT MEANS FOR ENGINEERING PRODUCTS EXPORTS**

05 | MONTHLY MUSINGS

64 | EEPC INDIA OFFICES

63 | EEPC INDIA CALENDAR OF EVENTS



**PANKAJ CHADHA**  
CHAIRMAN

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### From the Chairman's Desk

**R**ecently S&P Global published a report on global trade trends in 2026: "Global Insight Research: The Age of Agility". The report clearly indicates that while 2025 was marked by the seismic shifts in global trade dynamics, 2026 will mainly be a year of recalibration to these changed dynamics. It will definitely bring more challenges as the global uncertainty continues to impact economy and trade. In these challenging times, India's export performance has remained significantly positive – a very important milestone for the economy. The Indian engineering exports continued its growth journey in the first month of the current fiscal and recorded a growth of around 9percent. This is a significant achievement given the fact that regional disputes in the Middle East region continue to affect global trade and logistics. As per the government, the share of engineering in total merchandise exports was recorded at 23.8 percent in April 2026, a bit lower than 24.9 percent in April 2025. The growth in April 2026 was basically attributed to significant growth of Aluminium and its products (38percent), Copper and its products (80percent), Electric machinery and equipment (9.5percent), two and three wheelers (36percent), and Auto components/parts (7.2percent) among others. Out of 34 products panels, as much as 28 panels achieved year-on-year growth in exports during the month. Among the exporting regions, top destination North America and EU saw growth of 7.1percent and 13percent respectively in April 2026. The performance of India's engineering exports remained positive in almost all major regions including North America, European Union (EU), North East Asia, South Asia, etc. Decline was only noted in India's exports to WANA mainly due to decline in exports to UAE and Saudi Arabia, the two countries which have been significantly affected by the regional conflicts.

Interestingly although India's exports to WANA region declined, it recorded positive change in Oman, a country with which India has recently signed a comprehensive FTA. The growth was recorded at 17.5 percent. In fact, India has recorded positive engineering exports to all those countries with which it has recently signed FTA only barring UAE. In Australia, our exports have grown by around 22.5 percent, In the UK it has grown by 40.8 percent and in the EU, it went up by 13 percent. This is a significant achievement by our exporting community. However, as we deepen our cooperation with our major partners

through FTAs, we also need to address the non-tariff measures that create market access challenges for our exporters to make the FTAs fruitful. As per the recent Global Trade Update (UNCTAD), trade policies in recent times are becoming more interventionist and while tariffs are indeed rising, it is the non-tariff measures that are creating the major obstacles to trade – As per the report, tariff increased by 10 percent for developed economies, 16 percent for developing economies and 18% for least developed economies however still non-tariff barriers remain the main cause of cost escalation for around 88 percent of the global economies. The report further indicates that while tariff plays a major role in mostly developing nations including India, most of the developed nations including Europe, USA, Oceania and Latin America mainly mostly impose non-tariff barriers to restrict market access and the developing countries especially the MSMEs of those countries face the maximum burden as they are unable to meet these NTMs. The report further indicates that regulatory cooperation can significantly reduce trade costs - In Africa, even limited cooperation could reduce costs by 30-40 percent in sectors such as agriculture and manufacturing. Therefore, mapping and harmonization of corresponding regulations is essential to increase exports. There is also need for proper infrastructure within India which can handhold the exporters especially the MSMEs to fulfill regulatory compliance of the export markets. In several instances, the cost of compliance is significant and financial support for MSMEs is needed in such cases. Moreover, reducing the regulatory gaps between India and its partner countries through FTAs can significantly address the above issues. These efforts would definitely contribute towards expanding our export reach manifold.

Finally, I would like to invite EEPC members to participate in the upcoming exhibitions – SUBCON in Birmingham, UK and JIMEX in Jordan. The Indian Railway Sourcing Week is also scheduled in mid-June. Participation in such events would definitely broaden our reach and help us fulfill the Government of India's Viksit Bharat objective.

Thank you.



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## **ENGINEERING EXPORTS AT CROSSROADS NAVIGATING DEMAND AND SUPPLY-SIDE CHALLENGES IN A SHIFTING GLOBAL TRADE LANDSCAPE**



India's engineering sector remains one of the most critical pillars of the country's industrial base and export growth story. Encompassing a wide spectrum from iron and steel, machinery, and automobiles to electrical equipment, capital goods, and precision engineering the sector has consistently demonstrated dynamism, adaptability, and resilience. It is not only the largest contributor to India's merchandise exports but also a key driver of em-

ployment, technological capability, and global manufacturing integration.

Notwithstanding the challenging global trade environment, the sector has continued to show remarkable resilience. India's engineering exports reached an all-time high of USD 122.43 billion in FY 2025-26, registering about 5% growth over the previous year's USD 116.75 billion. This achievement is particu-

larly noteworthy given the adverse external environment marked by geopolitical tensions, supply chain disruptions, rising energy prices, and growing protectionism.

Engineering exports also remain India's largest export category, forming a substantial share of the country's total merchandise exports and reflecting the sector's global competitiveness. At the same time, this performance strengthens India's

longer-term aspiration to reach USD 250 billion in engineering exports by 2030, a target that reflects both ambition and opportunity for the sector.

However, the path ahead is not without challenges. The engineering sector is currently navigating a complex interplay of demand-side (external market pressures) and supply-side (domestic production and cost constraints) challenges, which together define its growth trajectory.

## Demand-Side Challenges

### 1. Rising protectionism and market access constraints

Global trade has witnessed a distinct shift towards protectionism, with major economies increasingly adopting tariff and non-tariff barriers. Measures such as:

- Tariff increases
- Safeguard duties
- Tariff Rate Quotas (TRQs)
- Local content requirements

For Indian exporters, particularly in sectors such as steel, aluminium, and capital goods, these barriers have reduced price competitiveness and complicated market entry. Traditional export destinations like the US and EU are becoming increasingly difficult to penetrate, necessitating diversification into emerging markets.

### 2. Carbon Border Adjustment Mechanism (CBAM) and Green Barriers

The European Union's Carbon Border Adjustment Mechanism (CBAM) represents a paradigm shift in global trade. By impos-

ing carbon-linked charges on imports, CBAM effectively introduces a new layer of trade restrictions.

Indian exporters face multiple challenges under CBAM:

- Additional taxation on carbon-intensive products
- Complex reporting and verification requirements
- Increased compliance costs

The burden is disproportionately higher on MSMEs, which lack the infrastructure and financial resources to measure and report emissions accurately. Over time, CBAM could significantly alter demand patterns in favour of low-carbon suppliers.

### 3. Section 232 Tariffs by the United States

The imposition of Section 232 tariffs by the United States continues to affect engineering exports, particularly in steel and aluminium sectors. With tariffs ranging from 25% to 50%, Indian products face a severe competitive disadvantage. Additionally, the complexity in determining content-based tariffs and compliance requirements further increases transaction costs and uncertainty for exporters.

### 4. Global economic slowdown and demand weakness

Demand for engineering goods is closely tied to global economic conditions. The slowdown in major economies has dampened export demand due to:

- Reduced industrial production
- Lower capital expenditure
- Weak consumer and investment sentiment

The real estate slowdown in China, economic stress in Europe, and high interest rates globally have directly impacted demand for engineering products such as machinery, transport equipment, and construction materials.

### 5. Geopolitical disruptions and logistics uncertainty

Recent geopolitical developments, particularly the West Asia / Red Sea crisis, have disrupted critical global shipping routes. The consequences include:

- Significant rise in freight costs
- Diversion to longer shipping routes
- Delays in cargo delivery
- Increased uncertainty in meeting export commitments

Even during such disruptions, Indian engineering exports managed to sustain growth, highlighting resilience. However, persistent disruptions pose serious risks to long-term trade relationships and reliability in global markets.

### 6. Non-Tariff Barriers and Regulatory Complexity

Engineering exports face numerous non-tariff barriers (NTBs), including:

- Stringent product standards and certifications
- Regulatory approvals
- Environmental compliance norms

The absence of Mutual Recognition Agreements (MRAs) exacerbates the problem, as exporters must comply with multiple certification regimes, increasing time and cost.

## Supply-Side Challenges

### 1. High input costs and raw material volatility

One of the key supplies-side challenges is the high cost of raw materials, especially metals such as steel and aluminium. Factors contributing to this include:

- Global price volatility
- Domestic supply issues
- Trade restrictions and safeguard duties

Higher input costs directly reduce export competitiveness, particularly for value-added engineering products.

### 2. Logistic challenges and high costs

Logistics remains a structural bottleneck for Indian exports. Key issues include:

- High inland transport costs
- Inadequate multimodal connectivity
- Port congestion and delays
- Container shortages during crises

Compared to global competitors, Indian exporters face relatively higher logistics costs, which erode pricing advantages.

### 3. Limited access to affordable finance

Access to timely and cost-effective finance continues to be a constraint for exporters, particularly MSMEs.

Challenges include:

- High interest rates
- Stringent collateral requirements

- Limited access to institutional credit

Export-oriented units require working capital support for production and shipment cycles, and delays in financing disrupt operations.

### 4. Credit rating constraints for MSMEs

The current credit rating framework often does not adequately capture the strengths of MSMEs. Issues include:

- Lack of formal financial documentation
- Benchmarking against large corporates
- Perceived higher risk

As a result, MSMEs face:

- Lower credit ratings
- Higher borrowing costs
- Restricted access to finance

### 5. Inverted duty structures

In several sectors, inverted duty structures persist, where import duties on inputs are higher than those on finished goods.

This discourages domestic value addition and undermines manufacturing competitiveness, leading to increased reliance on imports.

### 6. Technology gaps and low innovation intensity

The engineering sector is increasingly technology-driven, with global demand shifting towards advanced, high-precision, and sustainable products.

However, challenges remain in:

- R&D investment
- Adoption of advanced manufacturing technologies

- Innovation ecosystems

Without addressing these gaps, Indian exporters risk losing competitiveness in high-value segments.

### 7. Rising compliance burden

Exporters face complex regulatory and procedural requirements, such as:

- Customs and documentation processes
- Delays in incentives and refunds

Such issues increase transaction costs and reduce ease of doing business.

### 8. Energy Costs and Sustainability Transition

Energy costs have risen globally, impacting production costs. At the same time, exporters must invest in:

- Cleaner technologies
- Energy efficiency
- Sustainability compliance

The cost of this transition is particularly burdensome for MSMEs.

### 9. Dependence on Imports for Critical Inputs

India's reliance on imports of certain critical inputs such as rare earth magnets and specialised components poses a strategic risk. Recent export restrictions by countries controlling critical minerals have exposed vulnerabilities in supply chains, affecting sectors such as:

- Automobiles and EVs
- Electrical machinery
- Electronics

Such disruptions can directly

impact production and export commitments.

## Resilience amid adversity

Despite the multitude of challenges outlined above, the performance of India's engineering sector has been remarkable.

The achievement of USD 122.43 billion in engineering exports in FY 2025-26 stands as a testament to:

- Industry resilience
- Market diversification strategies
- Product innovation

- Policy support, including FTAs

Even during periods of severe disruption such as the West Asia crisis affecting key shipping routes the sector-maintained growth momentum. This resilience reflects the sector's ability to adapt to changing circumstances and leverage emerging opportunities.

## Conclusion

India's engineering export sector is navigating one of the most complex phases in global trade history. Demand-side challenges ranging from protectionism and CBAM to geopolitical disruptions—are constraining market access and export growth. Simultaneously, supply-side constraints such as high input costs,

financing gaps, and infrastructure limitations continue to weigh on competitiveness.

Yet, the sector's ability to achieve record exports in FY 2025-26 despite these challenges demonstrates its inherent strength and adaptability. The journey ahead towards USD 250 billion exports by 2030 will require a combination of strategic policy interventions, industry innovation, and global engagement.

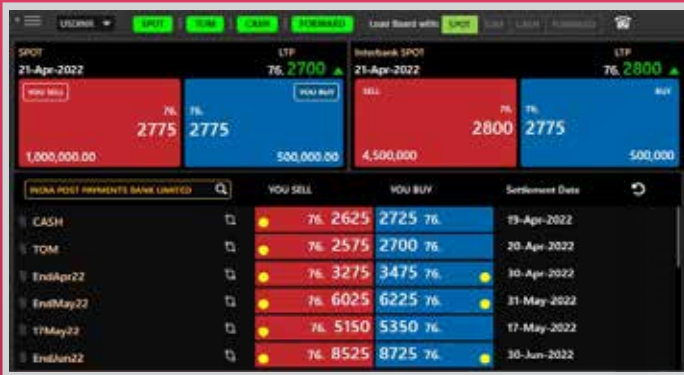
With the right support framework and continued resilience, India's engineering sector is well-positioned not only to overcome existing challenges but also to emerge as a key player in the evolving global industrial and trade landscape.



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# ENGINEERING TRADE ANALYSIS

## ■ FOR MARCH 2026 ■

**Engineering exports achieved its all-time high growth for the second straight fiscal year in 2025-26**

| Trade Flow                  | Export figures (in US\$ billion) |          |                   |                   | % Growth               |                                    |
|-----------------------------|----------------------------------|----------|-------------------|-------------------|------------------------|------------------------------------|
|                             | Mar-2025                         | Mar-2026 | Apr - Mar 2024-25 | Apr - Mar 2025-26 | Mar 2026 over Mar 2025 | Apr - Mar 2026 over Apr - Mar 2025 |
| Engineering exports         | 10.82                            | 10.94    | 116.75            | 122.43            | 1.13%                  | 4.86%                              |
| Overall merchandise exports | 42.05                            | 38.92    | 437.70            | 441.78            | -7.44%                 | 0.93%                              |
| Share of engineering (%)    | 25.73%                           | 28.11%   | 26.67%            | 27.71%            | ---                    | ---                                |
| Service Exports             | 35.63                            | 35.20    | 387.55            | 418.31            | -1.21%                 | 7.94%                              |

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

Indian engineering once again demonstrated its underlying strength as engineering exports from India rose to its all-time high for second consecutive fiscal year in 2025-26 despite several external adversities. This is the third time Indian engineering achieved its all-time high exports in last five fiscals after the Pandemic. During fiscal 2025-26, engineering shipment from India was recorded at USD 122.43 billion as against USD 116.75 billion in the previous fiscal, registering a growth of 4.86%. The month of March 2026 witnessed 1.13% growth in engineering exports over March 2025 even at the time of extreme supply disruption following the Iran War and subsequent closure of the Strait of Hormuz. Engineering shipment from India rose to USD 10.94 billion in March 2026 from USD 10.82 billion in March 2025. Engineering is the largest component of merchandise exports with a share of 27.71% during fiscal 2025-26. The share in March 2026 is even better at 28.11%. This record high exports of Indian engineering was led by high exports of Motor vehicles/cars, Copper and its products, Iron and steel, Electric machinery and equipment, Two and three wheelers, Products of iron and

steel, Industrial machinery, Other construction machinery, and Auto components/parts among others. Among the major exported product groups, 'Aircraft spacecraft and parts', 'Medical and scientific instruments' and 'Ships, boats and floating structures' conceded decline in exports during fiscal 2025-26. Region-wise, North America and European Union remained the top two exported destinations for Indian engineering with shares of 20% and 18% respectively in India's global engineering exports. Exports to North America increased by 1.9% while that to European Union increased by a higher 8.6% in 2025-26 over the previous fiscal. Exports to all other regions increased in 2025-26 except WANA, Other Europe and CIS. While exports to WANA dropped by 8%, engineering shipments to Other Europe and CIS fell by 4.5% and 5.9% year-on-year respectively. Among the top export destination countries, exports to second largest UAE and fourth largest Saudi Arabia slumped by 10% and 13% while exports to USA as the largest consumer increased by 2%. Exports to Germany and UK also increased in double-digit during 2025-26.

## HIGHLIGHTS

- Indian engineering exports rose to its all-time high for second consecutive fiscal year in 2025-26 despite several external adversities. This is the third time in last five fiscal years after the Pandemic when Indian engineering achieved its all-time high exports.
- During fiscal 2025-26, engineering shipment from India was recorded at an all-time high of USD 122.43 billion as against USD 116.75 billion in the previous fiscal, registering a growth of 4.86%.
- The month of March 2026 witnessed 1.13% growth in engineering export over March 2026 even at the time of extreme supply disruption following the Iran War and subsequent closure of the Strait of Hormuz.
- Engineering shipment from India in March 2026 rose to USD 10.94 billion from 10.82 billion in March 2025.
- As per the quick estimates of the government, Engineering is the largest component of merchandise exports with a rising share that is recorded at 27.71% during fiscal 2025-26. The share in March 2026 is even better at 28.11%.
- Among the 34 product panel as defined by the DGCIS, as much as 26 product panels achieved year-on-year growth in exports during fiscal 2025-26 while only eight conceded decline over the previous fiscal.
- During the fiscal 2025-26, exports of Copper and its products grew by a substantial 59.2% while Lead and its products grew by 34.2%. Two and three wheelers, and Motor vehicles/cars recorded 24.2% and 23.1% increase respectively.
- Among the exporting regions, engineering exports to North America increased by 1.9% while that to European Union increased by a higher 8.6% in 2025-26 over the previous fiscal. Exports to all other regions increased in 2025-26 except WANA, Other Europe and CIS. While exports to WANA dropped by 8%, engineering shipments to Other Europe and CIS fell by 4.5% and 5.9% year-on-year respectively.
- North America and European Union remained the top two exported destination for Indian engineering in 2025-26 with shares of 20% and 18% respectively in India's global engineering exports. WANA and ASEAN were next in the queue holding shares of 15% and 11% respectively.
- Among the top exporting destination countries, exports to second largest UAE and fourth largest Saudi Arabia slumped by 10% and 13% respectively in 2025-26. Exports to USA as the largest consumer increased by 2.3% despite elevated tariff imposed by the Trump Administration. Exports to Germany and UK also increased in double-digit during 2025-26.
- During March 2026, exports to WANA dropped by as much as 50.7% due to supply chain issue following the closure of Hormuz. Among the major exporting countries, exports to UAE and Saudi Arabia conceded substantial year-on-year drop of 67% and 45% respectively in March 2026.



## ENGINEERING EXPORTS: MONTHLY TREND

The monthly engineering export figures for 2025-26 vis-à-vis 2024-25 are shown below as per the latest DGCI&S estimates:

**Table 1: Engineering Exports: Monthly Trend in 2025-26** (Values in US\$ million)

| Month          | 2024-25  | 2025-26  | Growth (%) | Month            | 2024-25   | 2025-26   | Growth (%) |
|----------------|----------|----------|------------|------------------|-----------|-----------|------------|
| April          | 8557.11  | 9515.77  | 11.20      | November         | 8897.84   | 11016.67  | 23.81      |
| May            | 9974.13  | 9890.48  | -0.84      | December         | 10843.35  | 10982.90  | 1.29       |
| June           | 9386.21  | 9506.75  | 1.28       | October-December | 30994.27  | 31372.00  | 1.22       |
| April-June     | 27917.46 | 28913.00 | 3.57       | January          | 9424.17   | 10399.74  | 10.35      |
| July           | 9162.17  | 10433.12 | 13.87      | February         | 9174.86   | 10359.07  | 12.91      |
| August         | 9437.14  | 9900.70  | 4.91       | March            | 10817.86  | 10939.88  | 1.13       |
| September      | 9826.24  | 10113.95 | 2.93       | January-March    | 29416.89  | 31698.69  | 7.76       |
| July-September | 28425.55 | 30447.77 | 7.11       | April - March    | 116754.17 | 122431.46 | 4.86       |
| October        | 11253.08 | 9372.43  | -16.71     |                  |           |           |            |

Source: DGCI&S, Govt. of India

## TOP 25 ENGINEERING EXPORT DESTINATIONS IN MARCH 2026

We now look at the export scenario of the top 25 nations that had highest demand for Indian engineering products during March 2026 over March 2025 as well as in cumulative terms during

April-March 2025-26 vis-à-vis April-March 2024-25. The data clearly shows that top 25 countries contribute more than 74 % of total engineering exports.

**Table 2: Engineering exports country-wise**

(Values in US\$ Million)

| Countries    | Mar-25  | Mar-26  | Growth (%) | Apr' -Mar' 2024-25 | Apr' -Mar' 2025-26 | Growth (%) |
|--------------|---------|---------|------------|--------------------|--------------------|------------|
| U S A        | 1886.80 | 1831.36 | -2.9%      | 19157.31           | 19603.31           | 2.3%       |
| UAE          | 714.82  | 237.40  | -66.8%     | 8277.50            | 7457.78            | -9.9%      |
| GERMANY      | 402.69  | 456.85  | 13.5%      | 4337.14            | 4968.54            | 14.6%      |
| SAUDI ARABIA | 450.57  | 247.72  | -45.0%     | 5635.38            | 4892.99            | -13.2%     |
| U K          | 429.07  | 443.14  | 3.3%       | 4013.22            | 4744.86            | 18.2%      |

| Countries                                        | Mar-25   | Mar-26   | Growth (%) | Apr' -Mar'<br>2024-25 | Apr' -Mar'<br>2025-26 | Growth (%) |
|--------------------------------------------------|----------|----------|------------|-----------------------|-----------------------|------------|
| SINGAPORE                                        | 334.63   | 561.72   | 67.9%      | 4469.33               | 4501.89               | 0.7%       |
| CHINA                                            | 216.07   | 456.98   | 111.5%     | 2667.47               | 3531.09               | 32.4%      |
| ITALY                                            | 261.77   | 278.65   | 6.5%       | 2994.04               | 3472.74               | 16.0%      |
| MEXICO                                           | 314.26   | 304.26   | -3.2%      | 3536.02               | 3384.43               | -4.3%      |
| KOREA RP                                         | 262.14   | 244.36   | -6.8%      | 2597.12               | 3030.90               | 16.7%      |
| SOUTH AFRICA                                     | 225.55   | 279.54   | 23.9%      | 2517.98               | 2895.27               | 15.0%      |
| JAPAN                                            | 211.39   | 255.01   | 20.6%      | 2438.09               | 2654.09               | 8.9%       |
| BRAZIL                                           | 216.12   | 227.10   | 5.1%       | 2238.00               | 2497.74               | 11.6%      |
| NEPAL                                            | 218.07   | 221.77   | 1.7%       | 2252.03               | 2412.87               | 7.1%       |
| FRANCE                                           | 206.87   | 223.65   | 8.1%       | 2496.03               | 2346.44               | -6.0%      |
| NETHERLAND                                       | 172.66   | 184.82   | 7.0%       | 1905.41               | 2226.82               | 16.9%      |
| THAILAND                                         | 181.69   | 166.46   | -8.4%      | 2005.25               | 2140.29               | 6.7%       |
| VIETNAM                                          | 139.21   | 264.43   | 90.0%      | 1435.26               | 2052.41               | 43.0%      |
| TURKEY                                           | 253.03   | 181.60   | -28.2%     | 3044.60               | 1959.22               | -35.6%     |
| BANGLADESH                                       | 214.20   | 158.30   | -26.1%     | 2187.61               | 1919.79               | -12.2%     |
| SPAIN                                            | 112.64   | 156.69   | 39.1%      | 1386.54               | 1792.16               | 29.3%      |
| SRI LANKA                                        | 119.20   | 164.55   | 38.0%      | 1166.96               | 1765.37               | 51.3%      |
| BELGIUM                                          | 146.60   | 158.05   | 7.8%       | 1400.94               | 1753.91               | 25.2%      |
| MALAYSIA                                         | 127.23   | 233.80   | 83.8%      | 1458.72               | 1686.55               | 15.6%      |
| INDONESIA                                        | 130.30   | 140.90   | 8.1%       | 1938.54               | 1608.84               | -17.0%     |
| Total engineering exports<br>to top 25 countries | 7947.61  | 8079.14  | 1.7%       | 87556.51              | 91300.31              | 4.3%       |
| Total engineering exports                        | 10817.86 | 10939.88 | 1.1%       | 116754.17             | 122431.46             | 4.9%       |

Source: DGCI&S

**REGION WISE INDIA'S  
ENGINEERING EXPORTS**

The following table depicts region wise India's engineering exports for April-March 2026 as compared to April-March 2025

**Table 3: Region wise engineering exports in April-March 2025-26 vis-à-vis April-March 2024-25**

(Values in US\$ Million)

| Region                      | Mar-25          | Mar-26          | Growth (%)  | Apr' -Mar'<br>2024-25 | Apr' -Mar'<br>2025-26 | Growth (%)  |
|-----------------------------|-----------------|-----------------|-------------|-----------------------|-----------------------|-------------|
| NORTH AMERICA               | 2315.24         | 2253.92         | -2.6%       | 23920.41              | 24379.84              | 1.9%        |
| EUROPEAN UNION              | 1769.67         | 1868.70         | 5.6%        | 20058.77              | 21793.04              | 8.6%        |
| WANA                        | 1751.92         | 864.29          | -50.7%      | 19503.03              | 17938.41              | -8.0%       |
| ASEAN                       | 992.03          | 1493.70         | 50.6%       | 12245.43              | 13120.71              | 7.1%        |
| N E ASIA                    | 848.18          | 1094.40         | 29.0%       | 8768.11               | 10432.74              | 19.0%       |
| SSA( Sub Saharan<br>Africa) | 879.50          | 1043.32         | 18.6%       | 8759.86               | 10101.92              | 15.3%       |
| OTHER EUROPE                | 724.93          | 676.84          | -6.6%       | 7553.99               | 7217.28               | -4.5%       |
| LATIN AMERICA               | 601.81          | 729.79          | 21.3%       | 6187.14               | 7109.75               | 14.9%       |
| SOUTH ASIA                  | 612.75          | 598.29          | -2.4%       | 6494.01               | 6742.84               | 3.8%        |
| OCEANIA                     | 146.51          | 154.00          | 5.1%        | 1378.54               | 1712.08               | 24.2%       |
| CIS                         | 164.39          | 148.28          | -9.8%       | 1813.84               | 1706.87               | -5.9%       |
| OTHERS                      | 10.93           | 14.34           | 31.3%       | 71.03                 | 175.98                | 147.8%      |
| <b>Grand Total</b>          | <b>10817.86</b> | <b>10939.88</b> | <b>1.1%</b> | <b>116754.17</b>      | <b>122431.46</b>      | <b>4.9%</b> |

Source: DGCI&S

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



## Region-wise observations for April- February 2025-26:

- **North America:** Exports to North America declined mainly due to ongoing geopolitical conflicts in Middle East and West Asia region which impacted logistics significantly
- **WANA:** The geopolitical conflict also impacted India's exports to the WANA region as exports came down by almost 50%. It needs to be mentioned here that UAE being a trade-transshipment hub, several Indian exporters also have there warehouses in UAE for further trade with Europe, Africa and the USA. The recent geopolitical conflicts in the region have also impacted these warehouse activities
- **Other Europe:** In case of Other Europe, the decline is accounted for by Turkey - in April-March 2025-26, India's exports to Turkey declined by 35.6% and in

March alone the decline was 28.2%.

- **CIS:** In CIS region, exports to Russia declined by around 15.1% which also contributed towards decline in exports to the CIS

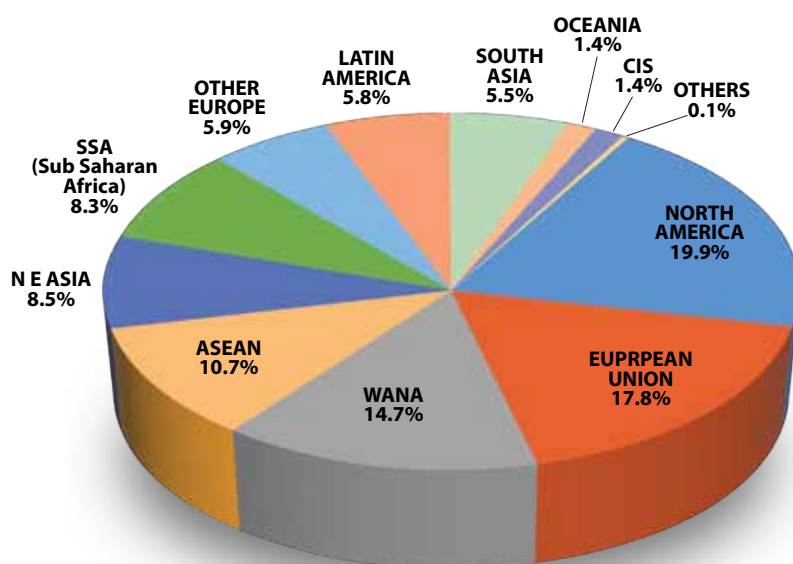
### Other Observations:

- » Decline in Mexico continues not only due to the logistics issues but also due to their recently announced trade reforms under which tariffs on over 1,400 products rose sharply—ranging from 5% to 50%—for imports from countries without a Free Trade Agreement (FTA) with Mexico effective from 1st January 2026
- » Another country where India's exports continued to decline is Bangladesh - major reason can be attributed to their recent tax reforms whereby Bangladesh has

withdrawn the existing import duties on steel raw materials and replaced it with a combination of VAT and Advanced Income Tax (AIT) which has increased the effective tax burden on manufacturers using imported steel for further processing by upto 40%. Even in cases of products with zero customs duty, the additional duties increase the cost burden.

- » Amidst the decline, India's exports performed significantly well in ASEAN as it recorded more than 50% increase and North East Asia where exports increased by 29% during March 2026. Exports also rose for Oceania by more than 5% which may indicate that some trade diversion could be done successfully towards India's East as Indian exporters faced logistics issues in the West

**Figure 1: Region-wise shares of India's engineering exports during April-March 2025-26**



Source: DGCI&S

## PANEL WISE INDIA'S ENGINEERING EXPORTS

The following table depicts region wise India's panel wise engineering exports for April-March 2026 as compared to April-March 2025

**Table 4: Panel wise engineering exports in April-March 2025-26 vis-à-vis [US\$ Mn] April-March 2024-25**

| S.No                                                                 | Sectors                                                        | Mar-25        | Mar-26        | Growth (%) | Apr' -March' 2024-25 | Apr' -March' 2025-26 | Growth (%)   | Share % (April-March 2025) | Share % (April-March 2026) |
|----------------------------------------------------------------------|----------------------------------------------------------------|---------------|---------------|------------|----------------------|----------------------|--------------|----------------------------|----------------------------|
| <b>1. Iron and Steel and Products made of Iron and Steel</b>         |                                                                |               |               |            |                      |                      |              |                            |                            |
| A                                                                    | Iron and Steel                                                 | 810.1         | 901.8         | 11%        | 9251.1               | 10316.6              | 11.5%        | 7.9%                       | 8.4%                       |
| B                                                                    | Products of Iron and Steel                                     | 981.3         | 814.3         | -17%       | 10116.8              | 10362.5              | 2%           | 8.7%                       | 8.5%                       |
|                                                                      | <b>Sub Total</b>                                               | <b>1520.3</b> | <b>1791.4</b> | <b>-4%</b> | <b>19367.9</b>       | <b>20679.1</b>       | <b>7%</b>    | <b>16.6%</b>               | <b>16.9%</b>               |
| <b>2. Non-Ferrous Metals and Products made of Non-Ferrous Metals</b> |                                                                |               |               |            |                      |                      |              |                            |                            |
| A                                                                    | Copper and products                                            | 205.9         | 469.0         | 128%       | 2320.6               | 3694.5               | 59%          | 2%                         | 3%                         |
| B                                                                    | Aluminium and products                                         | 654.9         | 700.0         | 7%         | 6855.7               | 7063.0               | 3%           | 6%                         | 6%                         |
| C                                                                    | Zinc and products                                              | 64.6          | 109.8         | 70%        | 740.5                | 878.7                | 19%          | 1%                         | 1%                         |
| D                                                                    | Nickel and products                                            | 21.0          | 20.7          | -2%        | 190.4                | 188.6                | -1%          | 0%                         | 0%                         |
| E                                                                    | Lead and products                                              | 108.9         | 104.5         | -4%        | 945.7                | 1268.7               | 34%          | 1%                         | 1%                         |
| F                                                                    | Tin and products                                               | 3.2           | 7.7           | 138%       | 22.8                 | 50.8                 | 123%         | 0%                         | 0%                         |
| G                                                                    | Other Non-Ferrous Metals                                       | 86.2          | 99.9          | 16%        | 870.7                | 1046.0               | 20%          | 1%                         | 1%                         |
|                                                                      | <b>Sub Total</b>                                               | <b>1144.8</b> | <b>1511.6</b> | <b>32%</b> | <b>32%</b>           | <b>14190.3</b>       | <b>19%</b>   | <b>10%</b>                 | <b>12%</b>                 |
| <b>3. Industrial Machinery</b>                                       |                                                                |               |               |            |                      |                      |              |                            |                            |
| A                                                                    | Industrial Machinery like Boilers, parts, etc                  | 101.4         | 103.6         | 2%         | 855.5                | 1035.9               | 21%          | 1%                         | 1%                         |
| B                                                                    | IC Engines and Parts                                           | 396.0         | 344.8         | -13%       | 3881.9               | 4115.9               | 6%           | 3%                         | 3%                         |
| C                                                                    | Pumps of all types                                             | 142.5         | 131.9         | -7%        | 1550.1               | 1632.2               | 5%           | 1%                         | 1%                         |
| D                                                                    | Air condition and Refrigerators                                | 220.2         | 258.8         | 18%        | 1964.5               | 2311.3               | 18%          | 2%                         | 2%                         |
| E                                                                    | Industrial Machinery for dairy, food processing , textiles etc | 904.5         | 786.1         | -13%       | 8362.1               | 9024.7               | 8%           | 7%                         | 7%                         |
| F                                                                    | Machine Tools                                                  | 83.7          | 74.7          | -11%       | 808.6                | 897.6                | 11%          | 1%                         | 1%                         |
| G                                                                    | Machinery for Injecting moulding, valves and ATMs              | 278.3         | 277.6         | 0%         | 2837.1               | 3114.6               | 10%          | 2%                         | 3%                         |
|                                                                      | <b>Sub Total</b>                                               | <b>2126.7</b> | <b>1977.6</b> | <b>-7%</b> | <b>20259.7</b>       | <b>22132.2</b>       | <b>9%</b>    | <b>17%</b>                 | <b>18%</b>                 |
| <b>4. Electrical Machinery</b>                                       |                                                                |               |               |            |                      |                      |              |                            |                            |
| A                                                                    | Electrical Machinery                                           | <b>1387.2</b> | <b>1335.4</b> | <b>-4%</b> | <b>14380.1</b>       | <b>15362.7</b>       | <b>7%</b>    | <b>12%</b>                 | <b>13%</b>                 |
| <b>5. Automobiles</b>                                                |                                                                |               |               |            |                      |                      |              |                            |                            |
| A                                                                    | Motor Vehicle/cars                                             | 911.1         | 993.3         | 9%         | 9004.0               | 11086.7              | 23%          | 7.7%                       | 9.1%                       |
| B                                                                    | Two and Three Wheelers                                         | 303.7         | 383.2         | 26%        | 3206.6               | 3982.9               | 24%          | 2.7%                       | 3.3%                       |
| C                                                                    | Auto Components/Part                                           | 784.7         | 733.2         | -6.6%      | 8184.5               | 8564.3               | 5%           | 7.0%                       | 7.0%                       |
| D                                                                    | Auto Tyres and Tubes                                           | 293.7         | 283.3         | -4%        | 3075.2               | 3199.7               | 4%           | 2.6%                       | 2.6%                       |
|                                                                      | <b>Sub Total</b>                                               | <b>2293.2</b> | <b>2393.1</b> | <b>4%</b>  | <b>23470.3</b>       | <b>26833.7</b>       | <b>14.3%</b> | <b>20.1%</b>               | <b>21.9%</b>               |

| S.No                                                  | Sectors                                     | Mar-25         | Mar-26         | Growth (%)  | Apr' -March' 2024-25 | Apr' -March' 2025-26 | Growth (%)   | Share % (April-March 2025) | Share % (April-March 2026) |
|-------------------------------------------------------|---------------------------------------------|----------------|----------------|-------------|----------------------|----------------------|--------------|----------------------------|----------------------------|
| <b>6. Aircrafts and Spacecraft parts and products</b> |                                             |                |                |             |                      |                      |              |                            |                            |
| A                                                     | Aircrafts and Spacecraft parts and products | 233.0          | 164.9          | -29%        | 6963.7               | 1664.2               | -76%         | 6.0%                       | 1.4%                       |
| <b>7. Ships Boats and Floating products and parts</b> |                                             |                |                |             |                      |                      |              |                            |                            |
| A                                                     | Ships Boats and Floating products and parts | 254.0          | 381.0          | 50%         | 4295.6               | 4110.7               | -4%          | 3.7%                       | 3.4%                       |
| <b>8. Other engineering products</b>                  |                                             |                |                |             |                      |                      |              |                            |                            |
| A                                                     | Medical and Scientific instruments          | 311.7          | 255.2          | -18%        | 2935.2               | 2859.2               | -3%          | 2.5%                       | 2.3%                       |
| B                                                     | Railway Transport                           | 28.1           | 43.6           | 55%         | 357.1                | 504.1                | 41%          | 0.3%                       | 0.4%                       |
| C                                                     | Hand Tools & Cutting Tools                  | 98.8           | 88.4           | -10%        | 1040.5               | 1022.4               | -2%          | 0.9%                       | 0.8%                       |
| D                                                     | Bicycle & Parts                             | 46.7           | 42.5           | -9%         | 411.3                | 473.9                | 15%          | 0.4%                       | 0.4%                       |
| E                                                     | Cranes Lifts & Winches                      | 102.9          | 80.4           | -22%        | 1083.0               | 1072.6               | -1%          | 0.9%                       | 0.9%                       |
| F                                                     | Office Equipment                            | 31.7           | 30.2           | -5%         | 288.0                | 394.8                | 37%          | 0.2%                       | 0.3%                       |
| G                                                     | Other Construction Machinery                | 302.7          | 317.9          | 5%          | 3028.8               | 3624.0               | 20%          | 2.6%                       | 3.0%                       |
| H                                                     | Prime Mica & Mica Products                  | 3.6            | 2.7            | -23%        | 31.7                 | 29.8                 | -6%          | 0.0%                       | 0.0%                       |
| I                                                     | Other Misc. Items                           | 488.9          | 434.7          | -11%        | 5112.7               | 5605.4               | 10%          | 4.4%                       | 4.6%                       |
| <b>9. Project Goods</b>                               |                                             |                |                |             |                      |                      |              |                            |                            |
|                                                       | Project Goods                               | 0.9            | 0.1            | -94%        | 3.2                  | 1.8                  | -44%         | 0.0%                       | 0.0%                       |
| <b>10. Other Rubber Product Except Footwear</b>       |                                             |                |                |             |                      |                      |              |                            |                            |
|                                                       | Other Rubber Product Except Footwear        | 171.6          | 164.5          | -4%         | 1779.1               | 1870.6               | 5%           | 1.5%                       | 1.5%                       |
|                                                       | <b>Sub total</b>                            | <b>1415.0</b>  | <b>1295.7</b>  | <b>-8%</b>  | <b>14288.1</b>       | <b>15586.1</b>       | <b>9%</b>    | <b>12.2%</b>               | <b>12.7%</b>               |
|                                                       | <b>Total engineering exports</b>            | <b>10817.9</b> | <b>10939.9</b> | <b>1.1%</b> | <b>116754.2</b>      | <b>122431.5</b>      | <b>4.86%</b> |                            |                            |

## Sectoral Observations:

India's engineering exports grew by about 4.86% in April-March 2025-26 to around US\$ 122.43 billion, with mixed performance across panels:

- Exports of iron and steel rose by 11.5% during April-February 2025-26, supported by higher shipments of primary steel, while products of iron and steel grew at a slower 5%. Overall, India's steel exports rose 8% to US\$18.96 billion

during April-February 2025-26, supported by strong demand from the USA, UAE, EU markets (Italy, UK, Belgium, Germany, Netherlands, Spain), Nepal and select WANA destinations (Saudi Arabia, Oman), Turkey from other Europe, etc.

As reflected in the Ministry of steel figures, India's crude steel production rose sharply by 11.2% year on year during April-Feb 2025-26, supported by a 10.4% increase in finished

steel production as well as 7.2% increase in finished steel consumption. Therefore steel consumption grew at a slower pace due to disrupted construction and infrastructure activity—the country's largest steel consuming segments. The growth figures highlight India's resilience and continued strength in steel production despite global fluctuations.

- The non-ferrous metals panel emerged as a major growth

driver, with exports rising by 18.8% to US\$14.19 billion during April-March 2025-26. Only exports of Lead declined by 4% mainly due to decline in exports to South Korea. However, overall exports to Korea in Fy 2025-26 remained positive at 23%

- c. Exports of industrial machinery increased by 9.2% to US\$22.13 billion during April-March 2025-26, driven by strong demand for Industrial Machinery like Boilers, Air-condition and Refrigeration machinery, Machine tools, reflecting rising global investment in automation and manufacturing. However,

exports of IC engines and parts grew only moderately.

- d. Exports of electrical machinery grew by 7% to US\$15.36 billion, supported by demand for power equipment, switchgear, and transmission-related products.
- e. The automobile sector recorded robust growth of 14.3%, with exports reaching US\$26.83 billion, led by South Africa, Mexico, UAE, Brazil, Germany, Colombia and most importantly Sri Lanka witnessing more than 300% growth, reflecting sustained demand for vehicles and components. Therefore,

South Asia, witnessed a strong rebound in Bangladesh, Sri Lanka and Nepal that boosted auto and auto components and parts exports. However, shipments to USA, Saudi Arabia, Turkey and Indonesia decelerated

Exports of other engineering products rose by 12.2% to US\$15.59 billion, supported by strong growth in office equipment, railway transport equipment, construction machinery, bicycle parts. In contrast, medical and scientific instruments and hand tools and cutting tools witnessed a decline of 3% and 2% respectively during April-March 2025-26.

## ENGINEERING EXPORTS – STATE-WISE ANALYSIS

**State wise engineering export performance- Data as on 2025-26**

**Note: DGCIS State figures are updated till the month of January 2026**

The table below indicates the exports from top Indian states. It is evident from the table that almost 95% of India's exports is contributed by the listed 12 states. Within this almost more than 60 percent of exports is done by Maharashtra, Tamil Nadu and Gujarat together during April-January 2025-26

**Table 5: State Wise Engineering Exports** (Value in US\$ billion)

| States      | April-December 2024-25 | April-December 2025-26 | Growth % | Share % |
|-------------|------------------------|------------------------|----------|---------|
| Maharashtra | 23.0                   | 25.1                   | 9%       | 27%     |
| Tamil Nadu  | 16.5                   | 18.1                   | 10%      | 20%     |
| Gujarat     | 11.5                   | 13.7                   | 19%      | 15%     |
| Delhi       | 5.7                    | 5.2                    | -9%      | 6%      |
| Karnataka   | 3.6                    | 5.1                    | 43%      | 6%      |
| Haryana     | 3.5                    | 3.9                    | 11%      | 4%      |
| Odisha      | 3.2                    | 3.7                    | 17%      | 4%      |
| West Bengal | 3.3                    | 3.4                    | 2%       | 4%      |

Source: DGCIS Portal

| States         | April-December 2024-25 | April-December 2025-26 | Growth % | Share % |
|----------------|------------------------|------------------------|----------|---------|
| Andhra Pradesh | 4.0                    | 3.2                    | -19%     | 4%      |
| Uttar Pradesh  | 2.4                    | 2.5                    | 7%       | 3%      |
| Punjab         | 1.6                    | 1.6                    | 1%       | 2%      |
| Rajasthan      | 1.2                    | 1.2                    | 5%       | 1%      |

Source: DGCIS Portal

Maharashtra leads with 28 billion USD in engineering exports (April-Jan 2025-26), up by 10% from 25.5 billion USD, securing a 27% national share through its robust ecosystem in engineering goods. West Bengal recorded marginal 3% growth

reaching US\$ 3.8 billion, holding a 4% share. Odisha achieved 18% growth to 4.2 billion USD (4% share) during April-January 2025-26. Karnataka achieved the highest growth of 43% during April-January 2025-26 reaching US\$

5.7 billion holding a share of 6%. Delhi contracted 8% to US\$ 5.8 bn (6% share) and Andhra Pradesh fell 14% to US\$ 3.7 bn (4% share), while Punjab was flat. Overall, growth remains concentrated in the western-southern hubs.

## INDIA'S REGION WISE ENGINEERING EXPORTS

**Table 6: Region Wise Engineering Exports (Value in US\$ billion)**

| Region Wise     | April-December 2024-25 | April-December 2025-26 | Growth % | Share % |
|-----------------|------------------------|------------------------|----------|---------|
| EASTERN REGION  | 7.6                    | 8.2                    | 8%       | 8.9%    |
| NORTHERN REGION | 14.7                   | 14.8                   | 1%       | 16.2%   |
| SOUTHERN REGION | 30.5                   | 28.5                   | -6%      | 31.1%   |
| WESTERN REGION  | 35.6                   | 40.1                   | 13%      | 43.8%   |
| Grand Total     | 88.2                   | 91.5                   | 4%       |         |

Source: DGCIS Portal

India's region-wise engineering exports (DGCIS) rose approximately 5% to US\$ 102 bn in Apr-Jan 2025-26, led by the Western Region at US\$ 44.9 bn (+14%, 44% share), which more than offset a contraction in

the Southern Region to US\$ 31.5 bn (-6%, 30.8% share). The Northern Region inched up marginally by 1% to US\$ 16.5 bn (16.1% share), while the Eastern Region posted steady growth of 9% to US\$ 9.2 bn (9%

share). Overall, exports remain highly concentrated in the West and South (~75% share), with the West acting as the primary growth engine this period.

Disclaimer: Please note the following disclaimer given by the DGCI&S whereby it is stated that state-wise export figures are based on state of origin code in shipping bills and may not give the right estimate. Also the data has been updated since the last two years



## CORRELATION BETWEEN MANUFACTURING OUTPUT 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. In 2024-25, both moved in the same direction in eight out of 12 months.**

The first two month of fiscal 2025-26 saw engineering export growth and manufacturing output growth moved in the opposite direction. In April, engineering export growth surged to double digit and manufacturing growth decelerated, while in May engineering export declined and manufacturing output growth inched up over the month. Then, In June, July and August 2025 however, both moved on the same direction. In June and July, both witnessed improvement in growth while in Aug 2025, both conceded moderation in growth. In September 2025 however, engineering growth continued to slowdown but

manufacturing growth accelerated. Both engineering growth and manufacturing growth moved in the same direction during October to December 2025. October 2025 saw both going down with decline in engineering exports while November 2025 witnessed surged in both with substantially higher growth. In December 2025 however, while engineering exports grew, the growth rate slowed down whereas the manufacturing growth rate was maintained. The month of January 2026 saw acceleration in engineering export growth but moderation in manufacturing output growth while February 2026 witnessed higher growth of both over the month.

The link between these two may not be established in one or two months, 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 2024**

| Months/ Year   | Engg. Export Growth (%) | Manufacturing Growth (%) |
|----------------|-------------------------|--------------------------|
| April 2024     | -4.49                   | 4.2                      |
| May 2024       | 7.43                    | 5.1                      |
| June 2024      | 10.26                   | 3.5                      |
| July 2024      | 5.12                    | 4.7                      |
| August 2024    | 4.28                    | 1.2                      |
| September 2024 | 10.55                   | 4.0                      |
| October 2024   | 39.27                   | 4.4                      |
| November 2024  | 13.72                   | 5.5                      |
| December 2024  | 8.33                    | 3.7                      |
| January 2025   | 7.49                    | 5.8                      |
| February 2025  | -8.64                   | 2.8                      |
| March 2025     | -3.92                   | 4.0                      |
| April 2025     | 11.20                   | 3.1                      |
| May 2025       | -0.84                   | 3.2                      |
| June 2025      | 1.28                    | 3.7                      |
| July 2025      | 13.87                   | 6.0                      |
| August 2025    | 4.91                    | 3.8                      |
| September 2025 | 2.93                    | 5.6                      |
| October 2025   | -16.71                  | 2.0                      |
| November 2025  | 23.81                   | 8.5                      |
| December 2025  | 1.29                    | 8.4                      |
| January 2026   | 10.35                   | 5.3                      |
| February       | 12.91                   | 6.0                      |

Source: Department of Commerce and MOSPI, Govt. of India

## IMPACT OF EXCHANGE RATE ON INDIA'S EXPORTS

How did the exchange rate fare during March 2026 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 March 2026, but also considered monthly average exchange rate of Rupee vis-à-vis the US Dollar for each month of fiscal 2023-24, 2024-25 and fiscal 2025-26 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 2025-26 vis-à-vis 2024-25**

(As per latest data released by FBIL)

| Monthly Average Exchange Rate<br>(1 USD to INR) |         |         | Year-on-Year Change<br>(%) | Direction    | Month-on-Month<br>Change (%) | Direction    |
|-------------------------------------------------|---------|---------|----------------------------|--------------|------------------------------|--------------|
| (1 USD to INR)                                  |         |         |                            |              |                              |              |
| Month                                           | 2024-25 | 2025-26 |                            |              |                              |              |
| April                                           | 83.41   | 85.56   | 2.58                       | Depreciation | -1.25                        | Appreciation |
| May                                             | 83.39   | 85.19   | 2.16                       | Depreciation | -0.43                        | Appreciation |
| June                                            | 83.47   | 85.90   | 2.91                       | Depreciation | 0.83                         | Depreciation |
| July                                            | 83.59   | 86.11   | 3.01                       | Depreciation | 0.24                         | Depreciation |
| August                                          | 83.90   | 87.52   | 4.31                       | Depreciation | 1.64                         | Depreciation |
| September                                       | 83.81   | 88.32   | 5.38                       | Depreciation | 0.91                         | Depreciation |
| October                                         | 84.03   | 88.42   | 5.22                       | Depreciation | 0.11                         | Depreciation |
| November                                        | 84.36   | 88.83   | 5.30                       | Depreciation | 0.46                         | Depreciation |
| December                                        | 84.99   | 90.09   | 6.00                       | Depreciation | 1.42                         | Depreciation |
| January                                         | 86.26   | 90.80   | 5.25                       | Depreciation | 0.79                         | Depreciation |
| February                                        | 87.05   | 90.77   | 4.27                       | Depreciation | -0.03                        | Appreciation |
| March                                           | 86.64   | 92.76   | 7.06                       | Depreciation | 2.19                         | Depreciation |

**Indian Rupee dropped to its alarming all-time low below 95 per USD during March 2026 and conceded worst fiscal year drop since fiscal 2011-12:** War between Iran and US-Israel and subsequent closure of strait of

Hormuz strengthened dollar and rupee weakened towards the end of February 2026 that continued in March 2026 as the uncertainty escalated following the continuation of the war. On a closing basis, INR depreciated by around 4% in

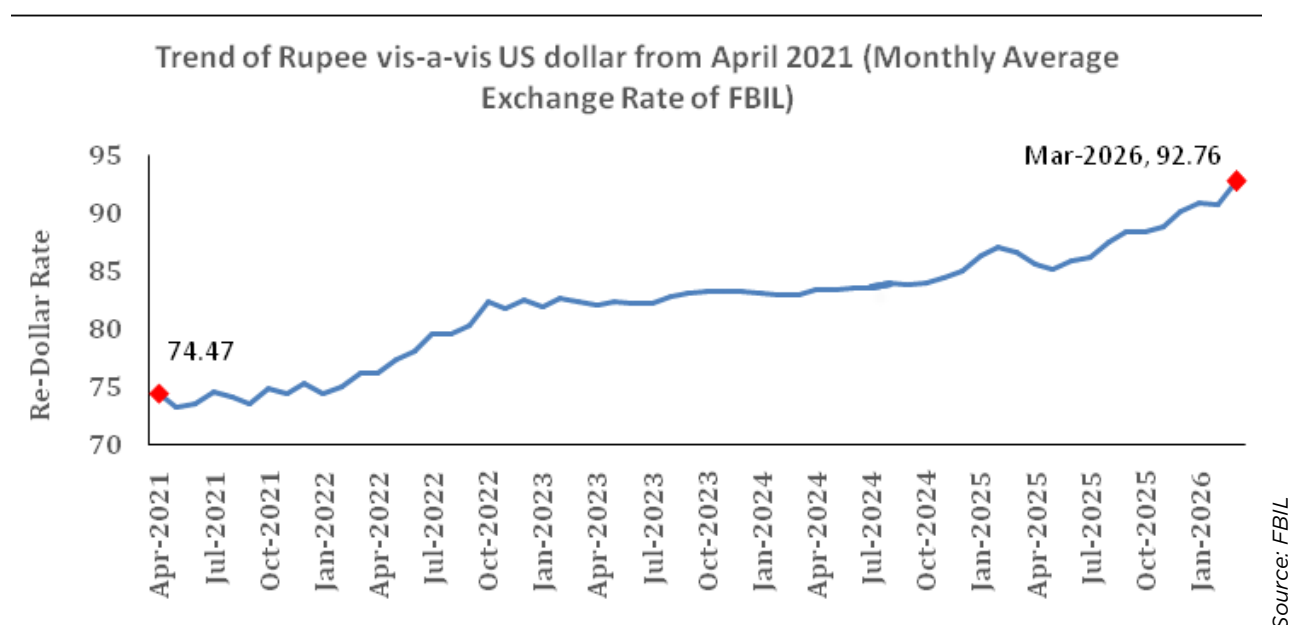
March and 10.6% in fiscal 2025-26 as it dropped below 95 and closed the month at 94.65 per USD. RBI intervention in the currency market helped rupee to recover in early-April 2026.

**Table 9: 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<br>(1 USD to INR) |         |         | Year-on-Year Change<br>(%) | Direction    | Month-on-Month<br>Change (%) | Direction    |
|-------------------------------------------------|---------|---------|----------------------------|--------------|------------------------------|--------------|
| (1 USD to INR)                                  |         |         |                            |              |                              |              |
| 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 |
| March                                           | 83.00   | 86.64   | 4.39                       | Depreciation | -0.47                        | Appreciation |

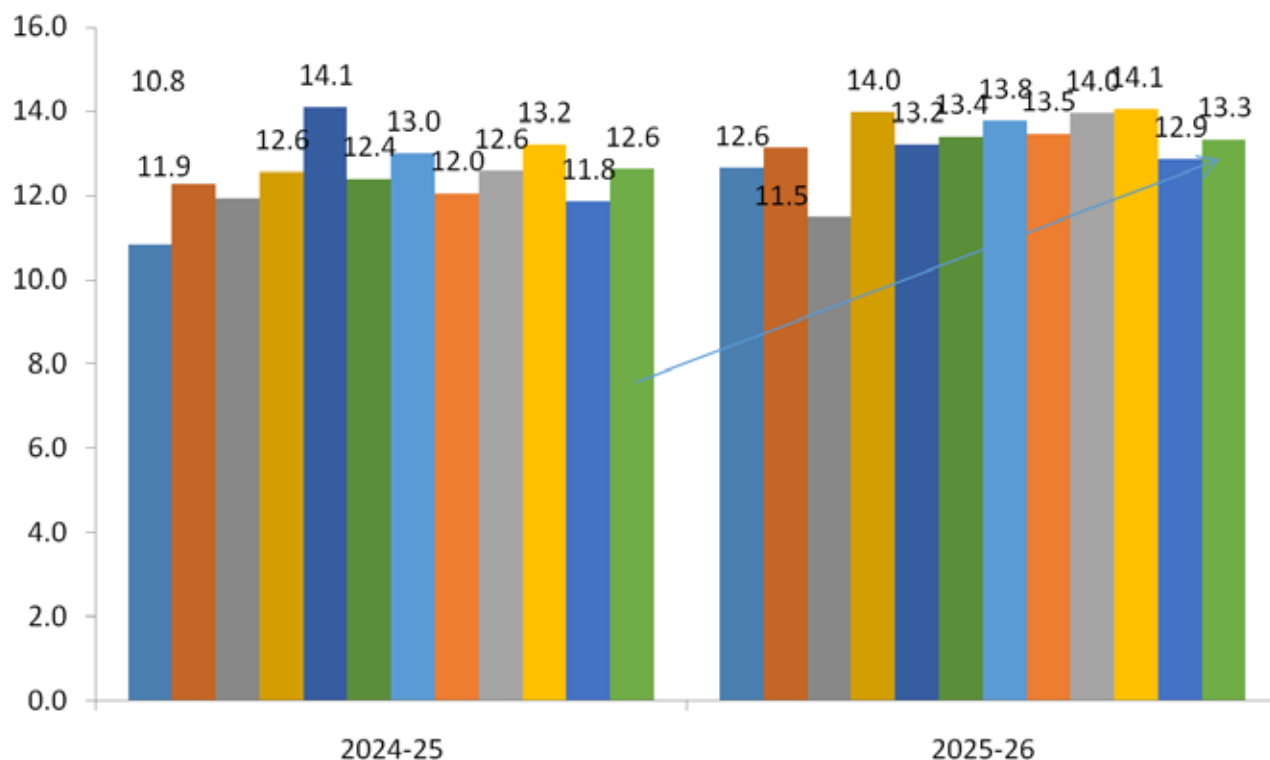
**Fig 2: Trend of Rupee vis-a-vis US dollar from April 2021  
(Monthly Average Rate of FBIL has been considered)**



## ANALYSIS OF INDIA'S ENGINEERING IMPORTS

- India's Engineering imports during March 2026 were valued at US\$ 13.3 billion compared to US\$ 12.6 billion in March 2025 registering a positive growth of 5.6 percent in dollar terms. In cumulative terms (Apr-Mar 2026), India's imports increased by 9.1 percent.
- In March 2026, imports increased sharply for Two and Three Wheelers, Auto Tyres And Tubes, Other Construction Machinery, Motor Vehicle/Cars, Hand Tool, Cutting Tool Of Metals, Copper and its products along with increase in, & Industrial Machinery for dairy.
- In March 2026, import increase was mainly noted from NE Asia, ASEAN, SSA( Sub Saharan Africa), Latin America and Others. In cumulative terms, imports increased from all regions barring North America, Oceania, Latin America and Other European countries.
- The share of engineering imports in India's total merchandise imports in Apr-Mar 2026 was estimated at 22.4 percent.
- 42.1 % of India's engineering imports come from N E Asia and 20.7 % from the EU. The next major suppliers are ASEAN (12.7%), North America (7.5%) and WANA (7.1%) during Apr-Mar 2026.

**Fig 3: Monthly Engineering Imports for April-February 2025-26 vis-a-vis April-March 2024-25**



Source: DGCI&S



We now present the trend in two-way yearly trade for the engineering sector for the 2025-26 depicted in the table below:

**Table 10: Monthly Trend in Engineering Trade Balance for the current FY 2025-26** - Values in US\$ Billions

| Trade Flow         | Apr  | May  | June | July | Aug  | Sep  | Oct  | Nov  | Dec  | Jan  | Feb  | Mar  |
|--------------------|------|------|------|------|------|------|------|------|------|------|------|------|
| Engineering Export | 9.5  | 9.9  | 9.5  | 10.4 | 9.9  | 10.1 | 9.4  | 11.0 | 11.0 | 10.4 | 10.4 | 10.9 |
| Engineering Import | 12.6 | 13.1 | 11.5 | 14.0 | 13.2 | 13.4 | 13.8 | 13.5 | 14.0 | 14.0 | 12.9 |      |
| Trade Balance      | -3.1 | -3.2 | -2.0 | -3.6 | -3.3 | -3.3 | -4.4 | -2.5 | -3.0 | -3.6 | -2.5 |      |

Source: DGCI&S, EEPC India Analysis

## CONCLUSION:

Indian engineering exports exhibited remarkable resilience as it achieved record value for the second consecutive year – in FY 2025-26, India’s engineering exports reached USD 122.43 billion as against UAS 116.75 billion in the previous fiscal recording a growth of 4.86%. The export growth came at a time when global trade faced unprecedented challenges in the form of geopolitical crisis in Middle East and West Asia which blocked one of the most prominent trading routes in the region making logistics difficult and expensive.

Despite these external pressures, India’s overall engineering exports remained positive in FY 2025-26 in North America, Europe, Latin America, etc. Only exports to

WANA region suffered due to the direct consequence of the conflict. This stellar performance is surely a testament to the perseverance and determination of our exporting community.

The export performance in FY 2025-26 is significant in the context of India’s medium-term objective of achieving US\$ 250 billion in engineering exports by 2030. Sustaining growth in a year characterised by global uncertainty strengthens the foundation for accelerated expansion in the coming years.

Policy measures announced during the year, including the Resilience & Logistics Intervention for Export Facilitation (RELIEF) Scheme with

an outlay of ₹497 crore, aimed at addressing war-risk insurance, insurance premium volatility, and elevated logistics costs, contributed to trade continuity during the WANA crisis. In addition, the inclusion of Chapter 72 (Iron and Steel products) under the Interest Subvention Scheme is expected to support the exporting community particularly for cost-sensitive segments of the industry.

Going forward, the combination of sectoral resilience, market diversification, and targeted policy interventions will remain critical for sustaining export momentum and progressing towards long-term export targets.

## ENGINEERING PRODUCT PANELS - COUNTRY-WISE ANALYSIS

We now analyze the performance of some of the important products for the fiscal April-March 2025-26 vis-à-vis April-March 2024-25. We have taken the major panels and computed the top importing countries to get an idea of the current trade pattern.

### Engineering Product Panel - Country matrix (Value in US\$ million)

| Product panels                                               | Top 5 nations | April-March 2024-25 | April-March 2025-26 | Growth |
|--------------------------------------------------------------|---------------|---------------------|---------------------|--------|
| Iron and Steel                                               | ITALY         | 1072.1              | 1222.2              | 14%    |
|                                                              | USA           | 587.5               | 740.9               | 26%    |
|                                                              | NEPAL         | 780.8               | 730.2               | -6%    |
|                                                              | UAE           | 704.1               | 615.8               | -13%   |
|                                                              | BELGIUM       | 520.2               | 596.1               | 15%    |
| Products of Iron and Steel                                   | USA           | 3105.3              | 3005.4              | -3%    |
|                                                              | UAE           | 860.6               | 832.8               | -3%    |
|                                                              | GERMANY       | 466.6               | 504.8               | 8%     |
|                                                              | SAUDI ARAB    | 561.9               | 433.8               | -23%   |
|                                                              | UK            | 341.1               | 326.7               | -4%    |
| Industrial Machinery                                         | USA           | 4223.0              | 4385.3              | 4%     |
|                                                              | UAE           | 1012.6              | 1265.4              | 25%    |
|                                                              | GERMANY       | 899.7               | 979.4               | 9%     |
|                                                              | CHINA         | 852.0               | 946.4               | 11%    |
|                                                              | SAUDI ARAB    | 681.1               | 753.2               | 11%    |
| Automobiles (Motor Vehicles/Cars and Two and Three Wheelers) | SOUTH AFRICA  | 1454.0              | 1710.9              | 18%    |
|                                                              | SAUDI ARAB    | 1570.8              | 1529.2              | -3%    |
|                                                              | MEXICO        | 1345.3              | 1454.2              | 8%     |
|                                                              | JAPAN         | 855.4               | 862.8               | 1%     |
|                                                              | UAE           | 705.6               | 752.8               | 7%     |

| Product panels                                       | Top 5 nations | April-March 2024-25 | April-March 2025-26 | Growth   |
|------------------------------------------------------|---------------|---------------------|---------------------|----------|
| Non-Ferrous metals                                   | USA           | 1533.9              | 1796.4              | 17%      |
|                                                      | SAUDI ARAB    | 768.3               | 1312.3              | 71%      |
|                                                      | KOREA RP      | 986.7               | 1301.0              | 32%      |
|                                                      | CHINA         | 619.5               | 1226.4              | 98%      |
|                                                      | VIETNAM       | 427.3               | 707.7               | 66%      |
| Electrical Machinery and Components                  | USA           | 2722.7              | 2958.7              | 9%       |
|                                                      | SINGAPORE     | 1526.1              | 1592.9              | 4%       |
|                                                      | UK            | 1213.4              | 1467.2              | 21%      |
|                                                      | GERMANY       | 950.5               | 1098.1              | 16%      |
|                                                      | KOREA RP      | 683.9               | 784.1               | 15%      |
| Aircrafts and Space crafts                           | USA           | 456.7               | 516.4               | 13%      |
|                                                      | FRANCE        | 747.2               | 301.4               | -60%     |
|                                                      | UK            | 154.9               | 186.4               | 20%      |
|                                                      | GERMANY       | 82.4                | 96.9                | 18%      |
|                                                      | SINGAPORE     | 78.1                | 69.6                | -11%     |
| Ships, Boats and Floating Structures and parts       | SINGAPORE     | 1812.5              | 1407.4              | -22%     |
|                                                      | UAE           | 1107.2              | 1314.0              | 19%      |
|                                                      | SRI LANKA     | 269.8               | 334.5               | 24%      |
|                                                      | OMAN          | 10.4                | 176.4               | 1600%    |
|                                                      | CHINA         | 0.0                 | 161.1               | 1332714% |
| Auto Components (including Auto Parts and Auto Tyre) | USA           | 2358.2              | 2214.3              | -6%      |
|                                                      | GERMANY       | 605.7               | 820.3               | 35%      |
|                                                      | BRAZIL        | 609.6               | 707.1               | 16%      |
|                                                      | UAE           | 426.6               | 527.2               | 24%      |
|                                                      | BANGLADESH    | 500.7               | 513.1               | 2%       |

Source: DGCI&S

- In April-March 2025-26, Italy, USA and Nepal ranked as the top three importers of Indian Iron and Steel, while the USA, UAE and Germany lead in import of products of Iron & Steel.
- The USA stood out as the primary importer of Indian 'Industrial machinery,' making up 20% of India's global exports in this category, followed by UAE and Germany with 6% and 4% shares, respectively during April-March 2025-26.
- South Africa, Saudi Arab, Mexico, Japan and UAE were top importers of India's Automobiles during April-March 2025-26 in India's global exports respectively over the same period previous fiscal.
- USA, Saudi Arab, South Korea, China and Vietnam were the top importers of India's Non-ferrous metals and products during April-March 2025-26.
- USA, Singapore, UK and Germany were the top importers of Indian Electrical Machinery & Components during the same period with 19%, 10%, 10% and 7% shares respectively.
- USA, France, UK, Germany and Singapore were the top importers of India's Aircrafts and Spacecraft during April-March 2025-26, making up to 70% of India's total export of Aircrafts and Spacecraft.
- Singapore, UAE and Sri Lanka became the largest importer of ships, boats and floating structures followed by Oman and China during April-March 2025-26.
- For the auto components' product group, USA remained the top importer in April-March 2025-26 followed by Germany, Brazil, UAE and Bangladesh, making up to 41% of India's total export under this category.



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>> Saudi  
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>> Oman  
>> Egypt  
>> Algeria  
>> Nigeria  
>> Indonesia  
>> Singapore  
>> Italy  
>> US  
>> Canada  
And many more

**20 -24  
APR  
2026**  
Germany

## HANNOVER MESSE 2026

EEPC India coordinated India Pavilion



- Ms Soumya Gupta, Consul General of India in Hamburg inaugurated the India Pavilion at Hannover Messe 2026. Mr Raman Raghu, Regional Chairman (SR), EEPC India (far right) and Mr Mukesh Samtani, Deputy Director, EEPC India (on the right of Consul General of India) also were seen



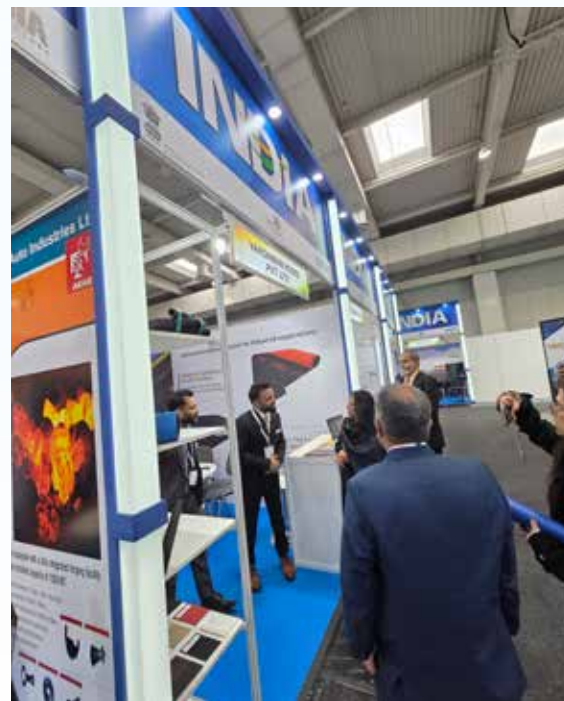
- Consul General of India in Hamburg took a tour of the Pavilion



- Consul General of India in Hamburg

20 -24  
APR  
2026  
Germany

## HANNOVER MESSE 2026



Consul General taking a tour of the India Pavilion

**24 APR  
2026**  
Kolkata

## TECHNICAL SESSION ON **CLOSING OF GST BOOKS OF ACCOUNTS FOR FY 2025-26 AND RECENT DEVELOPMENTS IN GST**



■ Mrs. Jaya Basu, Regional Director (ER), EEPIC India giving welcome address at the session



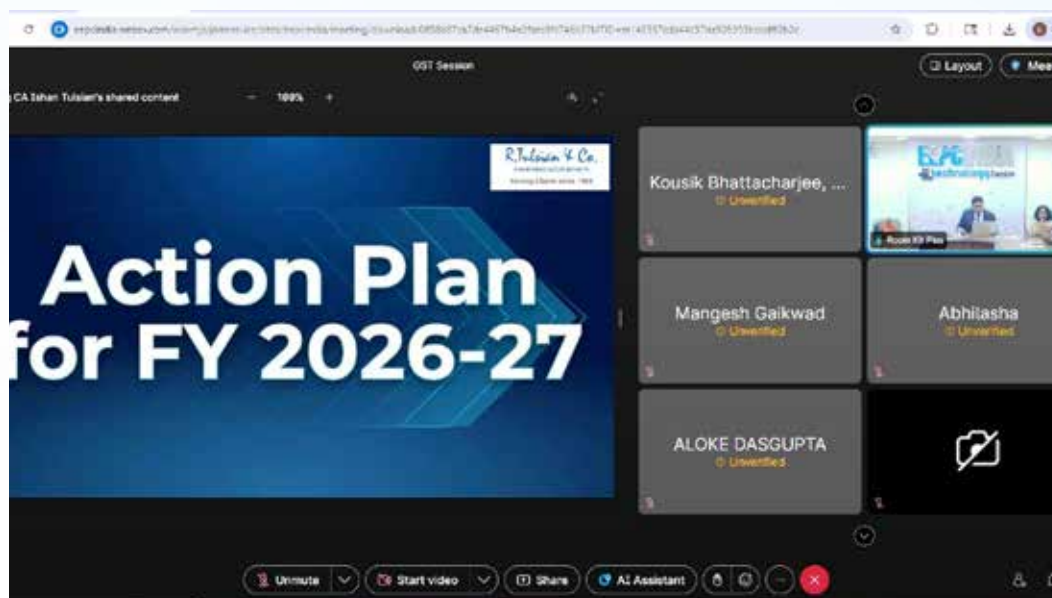
■ Mr. Ishan Tulsian, FCA, Partner, R. Tulsian & Co., Kolkata and R. Tulsian Global facilitating the session



■ Online participants at the session

**24 APR  
2026**  
Kolkata

## TECHNICAL SESSION ON **CLOSING OF GST BOOKS OF ACCOUNTS FOR FY 2025-26 AND RECENT DEVELOPMENTS IN GST**



■ Online participants at the session



■ Mrs. Jaya Basu, Regional Director (ER), EEPC India is presenting a memento to the speaker

**29 APR  
2026**  
New Delhi

## THE 57TH EEPC INDIA NATIONAL AWARDS AND 2ND EEPC INDIA GREEN AWARDS



Shri Pankaj Chadha, Chairman, EEPC India with Sardar Manjinder Singh Sirsa, Minister for Industries, Food & Supplies, Environment, Forest & Wild Life, Government of Delhi, as the Guest of Honour. Mr Aakash Shah, Vice Chairman, EEPC India is on the far right and Mr Rakesh Suraj, Regional Director (NR), EEPC India is on the far left



Shri Pankaj Chadha, Chairman, EEPC India with Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India as the Chief Guest



Shri Pankaj Chadha, Chairman, EEPC India with Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India - the Chief Guest and Sardar Manjinder Singh Sirsa, Minister for Industries, Food & Supplies, Environment, Forest & Wild Life, Government of Delhi-Guest of Honour



Shri Pankaj Chadha, Chairman, EEPC India welcoming Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India - the Chief Guest with bouquet



■ Shri Pankaj Chadha, Chairman, EEPC India welcoming Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India - the Chief Guest with shawl



■ Shri Pankaj Chadha, Chairman, EEPC India welcoming Sardar Manjinder Singh Sirsa, Minister for Industries, Food & Supplies, Environment, Forest & Wild Life, Government of Delhi as the Guest of Honour with a bouquet and Shri Aakash Shah, Vice Chairman, EEPC India is on the far right



■ Shri Pankaj Chadha, Chairman, EEPC India welcoming Sardar Manjinder Singh Sirsa, Minister for Industries, Food & Supplies, Environment, Forest & Wild Life, Government of Delhi as the Guest of Honour with a Shawl and Shri Aakash Shah, Vice Chairman, EEPC India is on the far right



■ Shri Aakash Shah, Vice Chairman, EEPC India welcoming Shri Vimal Anand, Joint Secretary, Department of Commerce, Ministry of Commerce and Industry, Government of India with a bouquet

**29 APR  
2026**  
New Delhi

## THE 57TH EEPC INDIA NATIONAL AWARDS AND 2ND EEPC INDIA GREEN AWARDS



Shri Aakash Shah, Vice Chairman, EEPC India welcoming Shri Vimal Anand, Joint Secretary, Department of Commerce, Ministry of Commerce and Industry, Government of India with a shawl



Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India as the Chief Guest



The audience



- • Sardar Manjinder Singh Sirsa, Minister for Industries, Food & Supplies, Environment, Forest & Wild Life, Government of Delhi as the Guest of Honour (third from right)
- Shri Vimal Anand, Joint Secretary, Department of Commerce, Ministry of Commerce and Industry, Government of India (far right)
- Shri Pankaj Chadha, Chairman, EEPC India (2nd from left)
- Shri Aakash Shah, Vice Chairman, EEPC India (2nd from right)
- Shri Adhip Mitra, Executive Director & Secretary, EEPC India (far left)



- Shri Pankaj Chadha, Chairman, EEPC India welcoming the audience

**29 APR  
2026**  
New Delhi

## THE 57TH EEPC INDIA NATIONAL AWARDS AND 2ND EEPC INDIA GREEN AWARDS



■ Shri Aakash Shah, Vice Chairman, EEPC India introducing the Chief Guest Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India



■ The Chief Guest, Shri Nitin Gadkari, Hon'ble Minister of Road, Transport and Highways, Government of India delivering the keynote address

## PRESENTATION OF 57TH NATIONAL AWARDS



## PRESENTATION OF 57TH NATIONAL AWARDS



## PRESENTATION OF 2ND EEPIC INDIA GREEN AWARDS





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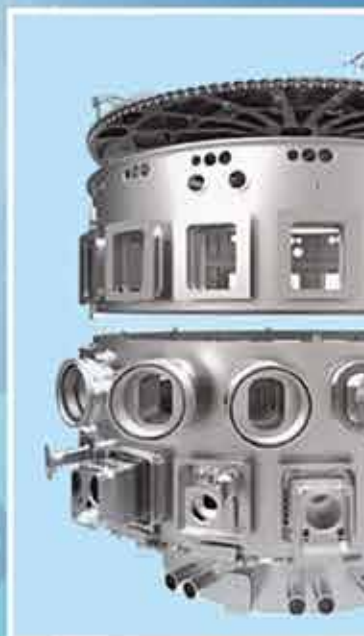
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# EUCBAM: What it Means for Engineering Products Exports

by Mr. Nilesh Bhattad

Founder & CEO, Cleancarbon.ai



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**T**he EU CBAM (Carbon Border Adjustment Mechanism) has entered into a mandatory reporting period from January, 2026. With this, CBAM tax, data auditing and verification, timely submission of reports and penalty for inaccurate CBAM reports become mandatory for EU importers and Indian suppliers of engineering products to the

EU. On April 7, 2026, the European Union Commission also released the first official CBAM certificate price, which is linked to EUETS. For Quarter 1 CBAM report, the CBAM certificate price will be €75.36 per-tonne of CO<sub>2</sub> (₹8,070-₹8,090 INR). This clearly substantiates the fact that CBAM is a permanent carbon pricing mechanism impacting both importers and exporters. In simpler

terms, higher embedded emissions will lead to increased CBAM cost liabilities.

Currently, CBAM covers products-made of iron and steel, aluminium, cement, fertilisers, electricity and hydrogen. The Commission has published the list of HSN Codes which are directly covered by CBAM.

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## CBAM to Prevent Carbon Leakage

The Carbon Border Adjustment Mechanism (CBAM) was introduced by the European Union Commission to prevent carbon leakage, a situation where companies outsource their production to another country with lax climate policies to evade carbon tax and decarbonisation responsibilities. The EU also introduced the CBAM to create a level playing field for all businesses and traders from across the world.

The entire mechanism is a replica of the European Union Emissions Trading System (EU ETS). Currently, CBAM is applicable to six highly carbon-intensive sectors such as Iron and Steel, Cement, Aluminium, Electricity, Fertilisers, and Hydrogen. Although CBAM is only applicable to six carbon-intensive sectors currently, it is expected to expand to more sectors in the future.

## Why is the Indian Iron and Steel Sector Highly Vulnerable to CBAM Reporting?

The European Union's Carbon Border Adjustment Mechanism (CBAM) represents a significant

shift in global trade regulations, especially for India's secondary steel sector, which constitutes 40% of the nation's steel production. With iron and steel being India's largest CBAM-covered exports to the EU, the financial impact of this regulation is substantial, potentially adding up to 25% in additional costs.

This challenge is particularly critical for India's MSMEs in the secondary steel sector, which are already facing barriers like low awareness and gaps in emissions data collection.

However, CBAM also presents an opportunity to innovate and adopt low-carbon technologies, helping the sector remain competitive and align with India's Net Zero aspirations. The potential impact of CBAM will be felt on India's steel exports even after the Omnibus package, focusing on the secondary steel sector, largely composed of micro, small, and medium enterprises (MSMEs).

The total contribution of MSMEs to the GDP is 38%, which indicates the steel sector's role as an economic powerhouse that will witness major ripples. Close examination of this data indicates that close to half of India's GDP will be under impact due to CBAM, causing significant effects on India's economy, trade,

and business.

### India's Steel Exports to the EU:

In FY 2022-23, India's iron and steel exports to the EU represented 23.5% of its total steel exports, valued at over \$13 billion.

### Financial Implications:

CBAM could impose an additional 25% carbon tax on Indian CBAM-covered goods exported to the EU, including steel, significantly raising costs and reducing competitiveness, as per the Centre for Science and Environment.

### Secondary Steel Sector Vulnerability:

The secondary steel sector, using energy-intensive methods like Direct Reduction Electric Arc Furnace (DRI-EAF), produces higher emissions and faces greater risk from CBAM's carbon tariffs.

## How Does CBAM Change Steel Exports?

EU CBAM is poised to leave a massive impact on the Indian steel sector, and it is going to be critical for small sector players as their economic outcomes will depend on it.

The CBAM rules will result in major changes, as India is the second-larg-

est crude steel producer in the world, showing a capacity to produce 179.5 million tonnes of crude steel in the Financial Year 2023-24, as per the Ministry of Steel report.

Moreover, SMEs constitute 33-35% of India's crude steel capacity. With this scale of the steel industry under direct impact, international trade will also witness changes. For instance, India's iron and steel exports to the European Union stand at 23.5%, as per the latest World Bank data.

In 2023, India ranked 2nd in global steel production with an output of 140.8 million tonnes, as per the World Steel in Figures 2024 report. Furthermore, India exported over \$13 billion worth of iron and steel in fiscal year 2023, as per the steel export data.

India's position as the second-largest steel producer and a major exporter highlights its global trade integration and business significance. The introduction of CBAM poses compliance challenges for Indian steel exports, especially to the EU, pushing the industry to adopt sustainable practices to stay competitive, profitable, and globally relevant.

## India's Domestic Steel Production and Greenhouse Gas Emissions

India's steel industry contributes around 2% of the GDP, and the production of finished steel in India increased by 49% to reach 122.3 million tonnes over the previous year.

India's emission intensity of steel production is at 2.54 tCO<sub>2</sub>/T Crude Steel (tCO<sub>2</sub>/TCS), which is significantly higher than the global average of 1.91, as per the Ministry of Steel report.

These figures are expected to witness a sharp rise in the coming years due to increasing domestic demand and global requirements.

If we look at the emission levels for which the Indian steel industry is responsible, credible data indicates that the sector accounts for 10-12% of India's total emissions.

India's historical contribution to the accumulation of greenhouse gases (GHGs) is about 4%, despite being home to 17% of the world's population. Hence, it is critical to decarbonize the Indian steel industry amid the rapidly changing global economy, which is witnessing the development of a stronger climate-conscious mindset.

## Major CBAM Challenges for Iron and Steel Companies

The challenges associated with CBAM compliance are multifaceted, requiring the implementation of comprehensive systems and processes to meet regulatory obligations and make businesses CBAM-proof.

Here are five key challenges organizations face in preparing CBAM reports:

### 1. Limited Market Readiness

### & Regulatory Familiarity

Despite CBAM's phased roll-out, there is a significant knowledge gap among stakeholders regarding its operational nuances — especially around emissions boundaries, embedded carbon calculation, product-level attribution, and quarterly reporting formats.

A lack of iron and steel sector-specific training and institutional guidance continues to hinder preparedness.

### 2. Precision in Emissions Calculation

CBAM compliance requires detailed, process-level emissions quantification aligned with EU methodologies. Current practices often lack the granularity and accuracy needed for product-wise embedded emissions tracking, particularly in plants with integrated or indirect emission sources.

### 3. Data Integrity and Audit Readiness

Generating traceable and auditable emissions data remains a major barrier.

EU regulators demand verifiable, digitized reporting backed by documentation and third-party validation. Manual or fragmented data capture systems in Indian MSMEs compromise both auditability and compliance assurance.

### 4. Shipment-Level Carbon Traceability

CBAM mandates shipment-wise emissions disclosures, including invoice-linked carbon values.

The lack of real-time tracking, ERP integration, and lifecycle data consolidation creates com-

pliance risks and delays in quarterly reporting cycles.

**5. Technology and Infrastructure Gaps** A significant share of Indian steel exporters, particularly in the secondary sector, lack the necessary MRV (Monitoring, Reporting, and Verification) infrastructure and digital capabilities.

As the Definitive Regime restricts the use of default values from 2026, real-time emissions tracking tools, carbon accounting platforms, and automated reporting systems will become critical.

## Conclusion

CBAM is a challenge — but also an opportunity for business expansion if the right technology is used. It can drive innovation, clean-tech adoption, and better global trade alignment.

For India's steel industry, the time to prepare is now if it wants to avoid a double whammy in the coming years. CBAM is not the only challenge the Indian iron and steel sector faces. The industry is also experiencing increasing pressure from the Green Steel Taxonomy introduced by the Ministry of Steel.

These regulations, coupled with practical setbacks such as inadequate infrastructure, high carbon intensity in the Indian iron and steel sector, and lack of the right technology, are adding to the crisis.

It is critical to invest in the right



technology not only to overcome this double challenge but also to use CBAM as an opportunity for business expansion and economic growth.

Cleancarbon.ai is one such technology platform trusted by more than 500 iron and steel exporters and EEPIC India to help exporters navigate the CBAM landscape and ensure accurate CBAM compliance. It helps in

accurate emissions data collection, specific embedded emissions calculation, and carbon tax analysis.

India's CBAM-first platform also supports data verification, auditing, reduction of CBAM tax burdens, and timely compliance for exporters.

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# EEPC INDIA CALENDAR OF EVENTS

All events subject to change

| Name of the Event                                | Date                  | Place                        | Product sectors                                                                                                      |
|--------------------------------------------------|-----------------------|------------------------------|----------------------------------------------------------------------------------------------------------------------|
| JIMEX                                            | 15 - 18 June 2026     | Amman, Jordan                | Subcontracting, Electricals, Mechanical Machinery, Automation                                                        |
| Africa Build Show and MegaWatt Africa Ghana 2026 | 7 - 9 July 2026       | Accra, Ghana                 | Electrical machinery, Transmission & Distribution, Renewable energy, Building & Construction, Earth Moving Machinery |
| Africa Rail 2026                                 | 07 - 08 July 2026     | Capetown, South Africa       | Rail, allied and Multiple Engineering                                                                                |
| Middle East Energy                               | 1 - 3 September 2026  | Dubai, UAE                   | Electrical machinery, Equipment for transmission & Distribution                                                      |
| Electric Power Indonesia                         | 2 - 5 September 2026  | Jakarta, Indonesia           | Electrical machinery, Equipment for transmission & Distribution                                                      |
| Auto Mechanica Frankfurt 2026                    | 8 - 12 September 2026 | Frankfurt, Germany           | Auto Components                                                                                                      |
| MSV BRNO 2026                                    | 6 - 9 October 2026    | Brno, Czech Republic         | Multiple Engineering Products                                                                                        |
| International Fastener Expo                      | 7 - 9 October 2026    | Phoenix, Arizona, USA        | Fasteners                                                                                                            |
| EuroBLECH 2026                                   | 20 - 23 October 2026  | Hannover, Germany            | Sheet metal products, components, aluminium construction, Iron and steel, Non-ferrous metal production               |
| CaPhEx (Central Asia Pharma Expo 2026)           | 27 - 28 October 2026  | Tashkent, Uzbekistan         | Pharmaceutical Machinery and Packaging; Biotech and Healthcare Products                                              |
| Saudi Build 2026                                 | 2 - 5 November 2026   | Riyadh, Saudi Arabia         | Building & Construction, Earth Moving Machinery                                                                      |
| Automechanika Dubai 2026                         | 10 - 12 November 2026 | Dubai Exhibition Centre, UAE | Automotive Components, Garage & Workshop Equipments                                                                  |
| Saudi ELNEX 2026                                 | 2 - 5 November 2026   | Riyadh, Saudi Arabia         | HVAC-R, Electromechanical, Electrical machinery, Alternative Energy and Water Technology                             |
| Indusmach Africa                                 | 18 - 20 November 2026 | Dar es Salaam, Tanzania      | Light engineering, engineering projects, auto components                                                             |
| World Health Expo Dubai (formerly Arab Health)   | 25 - 28 January 2027  | Dubai, UAE                   | Medical Devices & Healthcare                                                                                         |
| GMTN 2027                                        | 21 - 25 June 2027     | Germany                      | Foundry, Casting, Metallurgy                                                                                         |

# EEPC India offices

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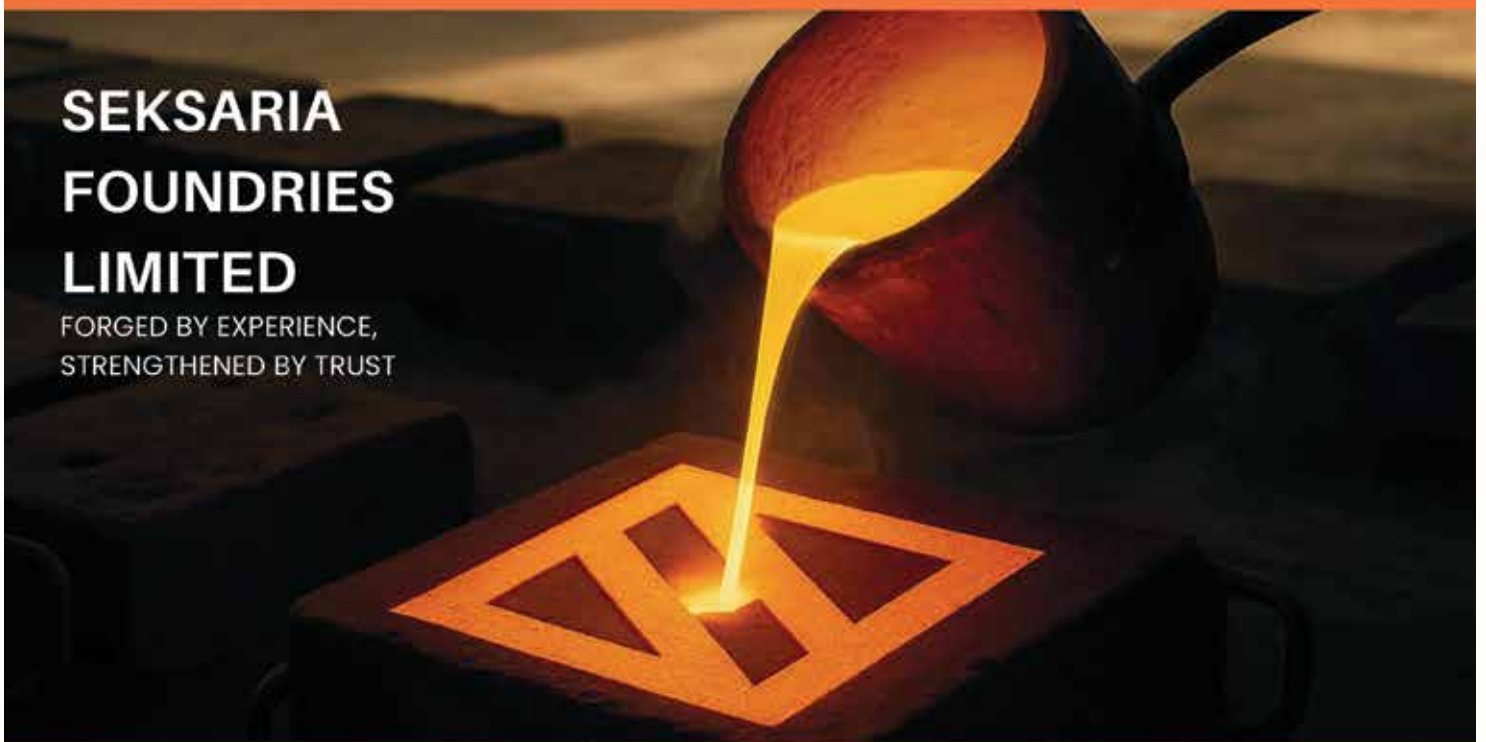
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