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INTERNATIONAL PROFILE GROUP

PVCu-the future for India



Farid Khan | CEO | New Delhi | 20.09.2013

# Land of Endless Opportunity

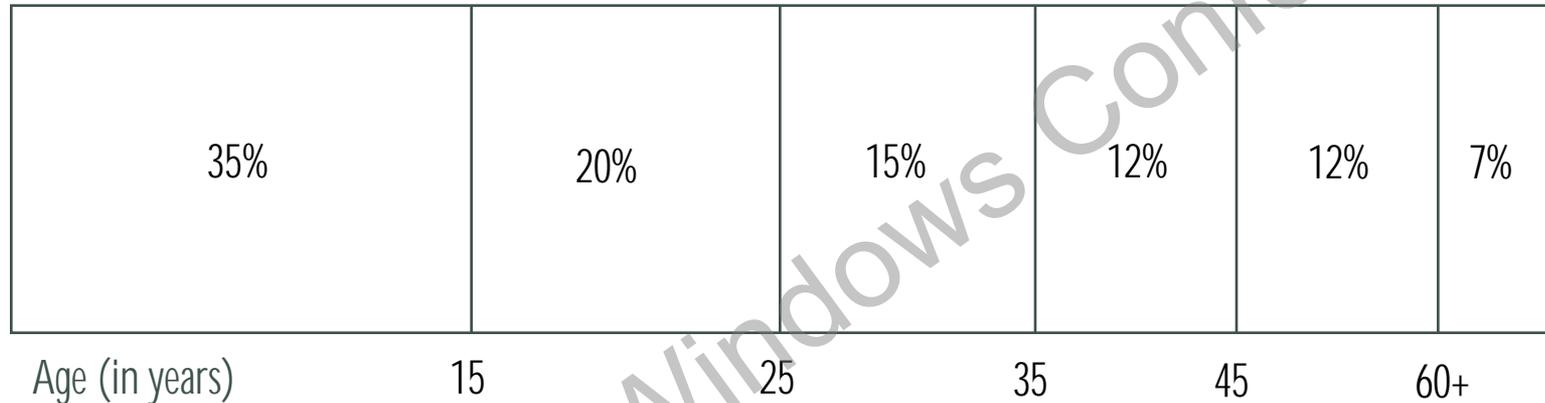


**India** is a huge market having lucrative investment opportunities.

uPVC windows & doors have very high growth prospects in Indian market due to large population and high investment in infrastructure. u-PVC market in India is in its growing stage and have great future potential.

Awareness about green building products and knowledge for versatility of u-PVC has also increased the opportunity to build up a good market share for windows and doors.

## Growth of population and human capital



Source: German Bank Research (2005) Global growth centres 2020, current topic , number 313, S 1-36

- Indian population grows around 17 million per year
- 35% of the population is younger than 15 years
- 70% of the population is younger than 35 years
- India's working-age population to rise by stunning 240m in 20 years compared with 10m in China

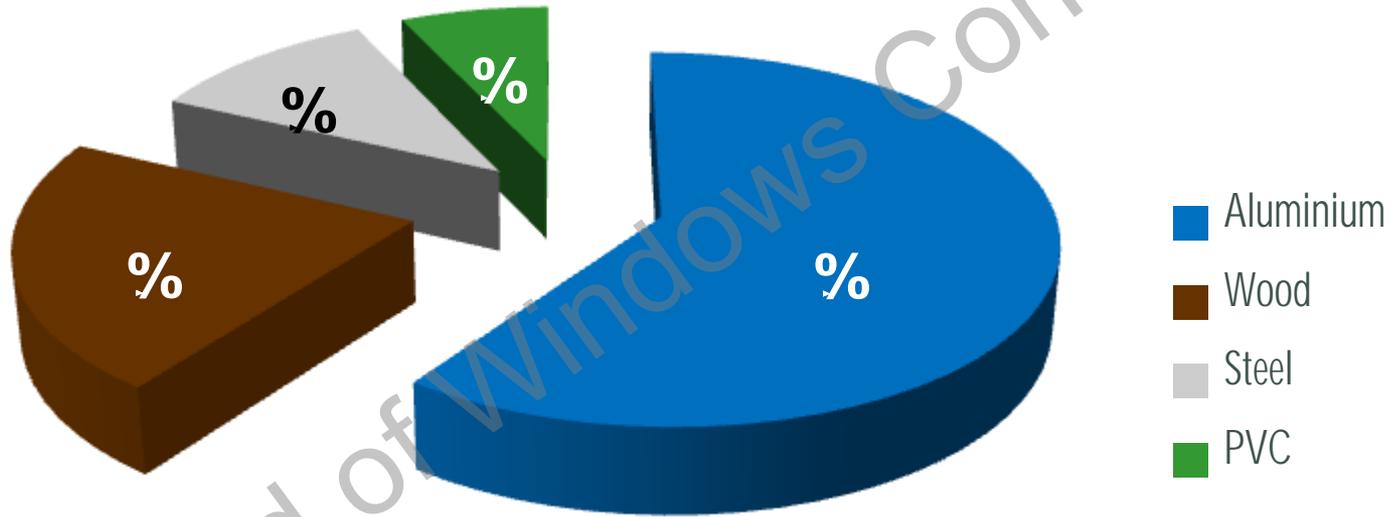
- Substitution of other window materials  
increasing demand for reconstruction / redevelopment
- Emerging trend of urbanisation
- Increasing demand for living space
  - => growing middle class
  - => young population
  - => increasing living space per capita

# A Closer Look at the Market

The key drivers in the evolution of the real estate market are:

- **Increase in urbanization** Only 300 million people live in cities, which implies an urbanization rate of 28% (vs. China's 40%). This means that 800 million people still conduct rural lives. As new jobs open, the migration from the countryside is expected to continue.
- **Emergence of the middle class** The wave of money generated by the service industry is sustaining a strong growth in employment from local and multinational corporations, with consequent need for new class A and B office space. Conversely, new jobs are sustaining the emergence of a middle class, which desires better housing and high quality retail.
- **Redevelopment opportunity** In historical downtowns, the urban quality of even the most prime real estate locations is low by western standards. Mumbai is the most evident case, where slums survive next to the “posh” parts of the city, and even in prime locations, lifelong fixed rents are withholding landlords from redeveloping decaying properties.

# Window market - India



• Total market size PVC: 25,000 tons

**PVC surging ahead**

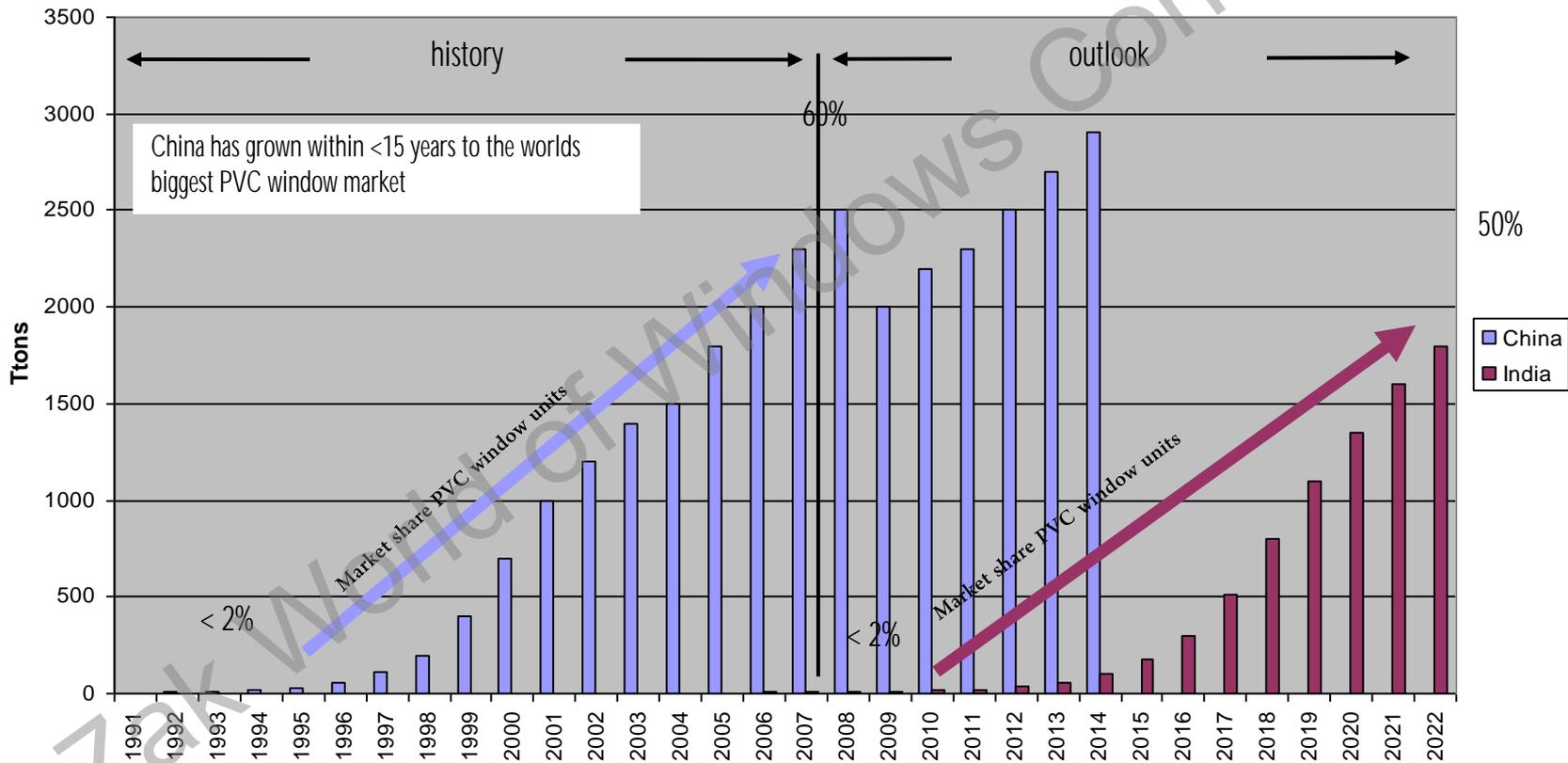
Approvals from various Govt. Departments

- Railways
- Central Public Works Department
- Military Engineering Services
- Directorate of Works Engineers
- Ministry of Defense

# Market Opportunity for uPVC



## Market development China / India – comparison and outlook



Source: Shanghai Chlor Alkali Chemicals Co. Ltd.; profine research

**India has the potential to follow Chinese growth pattern**

# PVCu windows for Indian conditions

- Aesthetics
- Dust Proof
- Noise Reduction
- Energy Saving
- Weather Proof Properties
- Maintenance Free
- Secure
- Customization



# PVCu- Tangible & Intangible Advantages



- Do not let outside heat in (in summer) or inside heat out (in winter) , provide comfort & save 25-30% electricity bill – Ideal for India.
- Provide sound & dust insulation – Ideal for Homes, Schools, Hospitals, Malls, Hotels, Offices, etc.
- Do not allow rains to come in , do not Swell – Ideal for Rainy and Coastal locations.
- Excellent weather ability, do not rust, crack, rot, chip, peel, flake, warp, fade and are termite proof.
- Durable, Minimum Maintenance, need no painting.
- Stylish & Elegant , available in all shapes and sizes.
- Secure - Safety locking arrangements and steel reinforcement.

## Green buildings, a fast emerging concept in the country

- Green building as one which ‘uses less water, optimises energy efficiency
- Conserves natural resources, generates less waste, and provides healthier spaces for occupants as compared to a conventional **building**’.
- Customers are increasingly looking at the return on investment on a project and reducing energy consumption. The need of the hour is to reduce expenditure related to energy and scale down its consumption..

# Versatility

- Outstanding energy efficiency.
- High quality, sound proof.
- Termite proof, dust proof.
- Versatile colour range, security, easy care and longevity.
- U-PVC Windows and doors have a greater energy saving potential than any other window material and rank at the top of the league in eco-efficiency analyses.
- Product for extreme conditions : Sound Insulation, Heat reduction, fire resistant



# Challenges for u-PVC

- Lack of awareness about quality of product
- Lack of awareness about the benefits of the product and the unorganised manner in which the industry is run are the two major hurdles.
- The biggest challenge is less awareness about energy conservation.
- Well entrenched low priced traditional materials (Aluminium in urban areas, Wood in semi-urban and rural areas, MS in Govt. buildings)
- Aluminium based profiles are still economical
- High Cost of uPVC Windows in comparison to conventional Products
- No Standardisation ( BIS)

# Goal – uPVC at its peak



**THANK YOU**



Zak World of Windows Conference