



INDIA

Incredible to Unstoppable

TAK Mathews
October 14th, 2009

Interlift 2009



INDIA

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INDIA – INCREDIBLE TO UNSTOPPABLE



Recognizing India



Diversity



Contradictions



Unstoppable India – The Proof



The Indian E&E market



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International Elevator & Escalator Expo

INDIA – Incredible to Unstoppable

Diversity - *Do I speak Indianese?*



മലയാളം

Malayāḷam

தமிழ்

Tamil



हिन्दी

Hindī

English

Indian Languages...

National Language: **Hindi**

Official Working Language:
English

Other Languages:

Assamese, Bengali, Bodo, Dogri,
Gujarati, Kannada, Kashmiri,
Konkani, Maithili, Malayalam,
Manipuri, Marathi, Nepali, Oriya,
Punjabi, Sanskrit, Santali, Sindhi,
Tamil, Telugu, Urdu

Dialects: 1600



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INDIA – Incredible to Unstoppable *Contradictions – Distribution of Wealth*



Accommodation for a family of 4!!



Antilia
27 floors (153 meters)



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Co-existing through Diversity & Contradiction



Half Empty



Half Full



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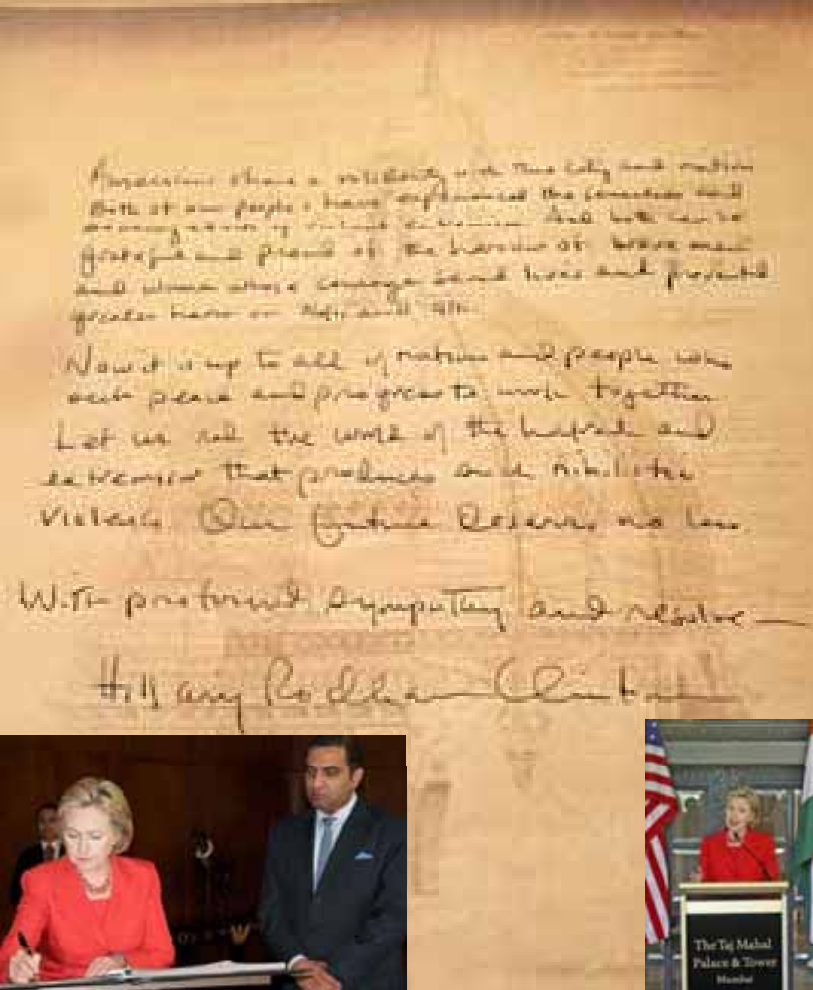
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You may knock me down, you cant keep me down!



July 2009



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INDIA – The Elephant



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Global meltdown – India still in the positive zone



THE ECONOMIC TIMES MUMBAI MONDAY 7 SEPTEMBER 2009

HOW DO THEY **COMPARE?**

GDP Estimates for 2009

Country	Pre-Lehman	A Year Later
United States	+1.3	-2.6
Japan	+0.9	-6.4
China	+9.0	+8.1
Britain	+0.6	-4.2
Canada	+2.0	-2.2
France	+1.0	-2.8
Germany	+1.1	-5.9
Russia	+6.8	-7.0
India	+7.1	+5.5
Indonesia	+5.5	+4.1
Pakistan	+4.4	+3.7
South Korea	+4.2	-1.8
Brazil	+3.4	-1.0
Egypt	+6.7	+4.4

Source: The Economist, 6 Sept 2008 and 3 September 2009



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India's bane, India's gain



THE ECONOMIC TIMES MUMBAI FRIDAY 7 AUGUST 2009

New mobile users up by 12 million in June

Indian mobile operators added over 12 million new users in June, taking the total number of users to 427.28 million, according to data released by regulator

Comparative Population

European Union: 492 million

USA: 307 million



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INDIA – Incredible to Unstoppable

The Future – positive indicators



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The Future – positives indicators



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INDIA - A Billion Opportunities

The Future – positives indicators



* FRIDAY 2 OCTOBER 2009 | MUMBAI

Car sales hit record high

FAST FORWARD

Car makers	SEP'09	SEP'08	CHG(%)
Maruti	71,594	64,682	11
Hyundai	27,803	22,311	25
Tata/Fiat	20,743	16,829	23
Honda Siel	5,794	3,104	87
General Motors	7,654	5,154	49
Mahindra	21,961	16,059	37
Skoda	1,854	1,213	53
Ford	3,405	2,273	50

Two-wheeler makers

Hero Honda	4,01,290	3,85,262	4
TVS	1,32,281	1,19,017	11
Suzuki Motors	15,719	12,514	26
Yamaha	26,394	10,142	NA

CORPORATE

* THE ECONOMIC TIMES MUMBAI WEDNESDAY 30 SEPTEMBER 2009

AUTO COS SEE UNEXPECTED RISE IN DEMAND DURING THIS FESTIVE SEASON

It's a long wait for key car models as cos can't keep up with demand



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The Future – positives indicators



E ECONOMIC TIMES MUMBAI WEDNESDAY 30 SEPTEMBER 2009

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FMCG cos stay in shape, eye 13% growth



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India – the party never stopped



NAI | HYDERABAD | KOCHI | KOLKATA | LUCKNOW | NEW DELHI | PUNE | WWW.ECONOMICTIMES.COM | * WEDNESDAY 30 SEPTEMBER 2009 | MUMBAI | 22 PAGES | PRICE RS 2.50 OR RS 4.50 ALONG WITH THE TIMES OF INDIA

Johnnie can take a walk, Bagpiper to be No.1

Party's Over For Diageo Brand As Mallya Whisky To Top Global Sales By Year-End

Sarah Jacob
BANGALORE

AS LAID-OFF workers at the Scottish home of Johnnie Walker drain the bitter cup, India's United Spirits is preparing to raise a toast to a whisky named in honour of a Scottish highland tradition — the Bagpiper. It is widely expected that at the end of this year, when the numbers are totalled, Johnnie Walker's iconic Striding Man will not be striding at the head of the band of whisky brands in India.

Bagpiper, walking with a little extra swagger in a ceremonial Indian dress complete with a turban, will be leading the party. In Kilmarnock, which will be losing its nearly two-century-old link with the brand because of Diageo's decision to shut the plant in the western coastal town, the workers are a will be of a future and rise.

“Bagpiper's strong growth has been achieved on the back of the investment in the brand, the consistent quality it has delivered to consumers and the imagery which has been spruced up by an English design house,” United Spirits president and MD Vijay Rekhi observed.

five said Bagpiper is India but there is no tween it and the whisky brand.”

450m: P 16

nth. United Spirits, part of the Vijay Mallya-owned UB Group, says it expects to sell 17 million cases of Bagpiper whisky in the fiscal to March. Johnnie Walker sales during the same period are projected at 16.8 million cases. In 2008, Johnnie Walker sold 16.3 million cases to 15.4 million by Bagpiper. Sales of the Indian whisky have been growing at 10-11%, United Spirits said, while the scotch brand's volumes grew by 4% in the fiscal to June 2009, according to Diageo.



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E & E Industry



The Indian E & E Market

Approximation Only



Fiera Milano Lift
November 12th, 2009

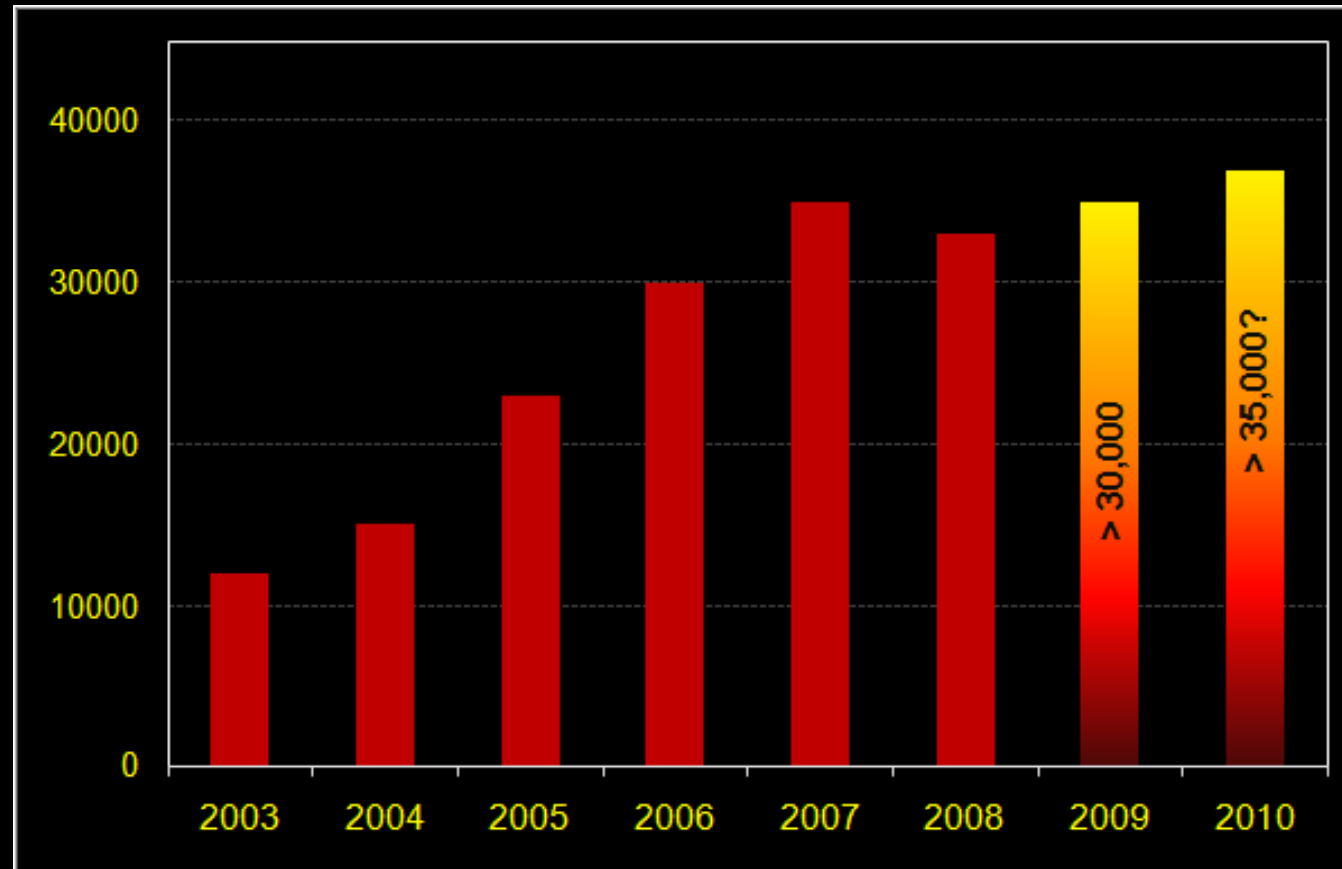
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INDIA - A Billion Opportunities

E & E Projected Market



All type of lifts / elevators

Standard lifts / home lifts / platform lifts / car lifts / hydraulic lifts / pneumatic lifts



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E & E Market Shares (units)

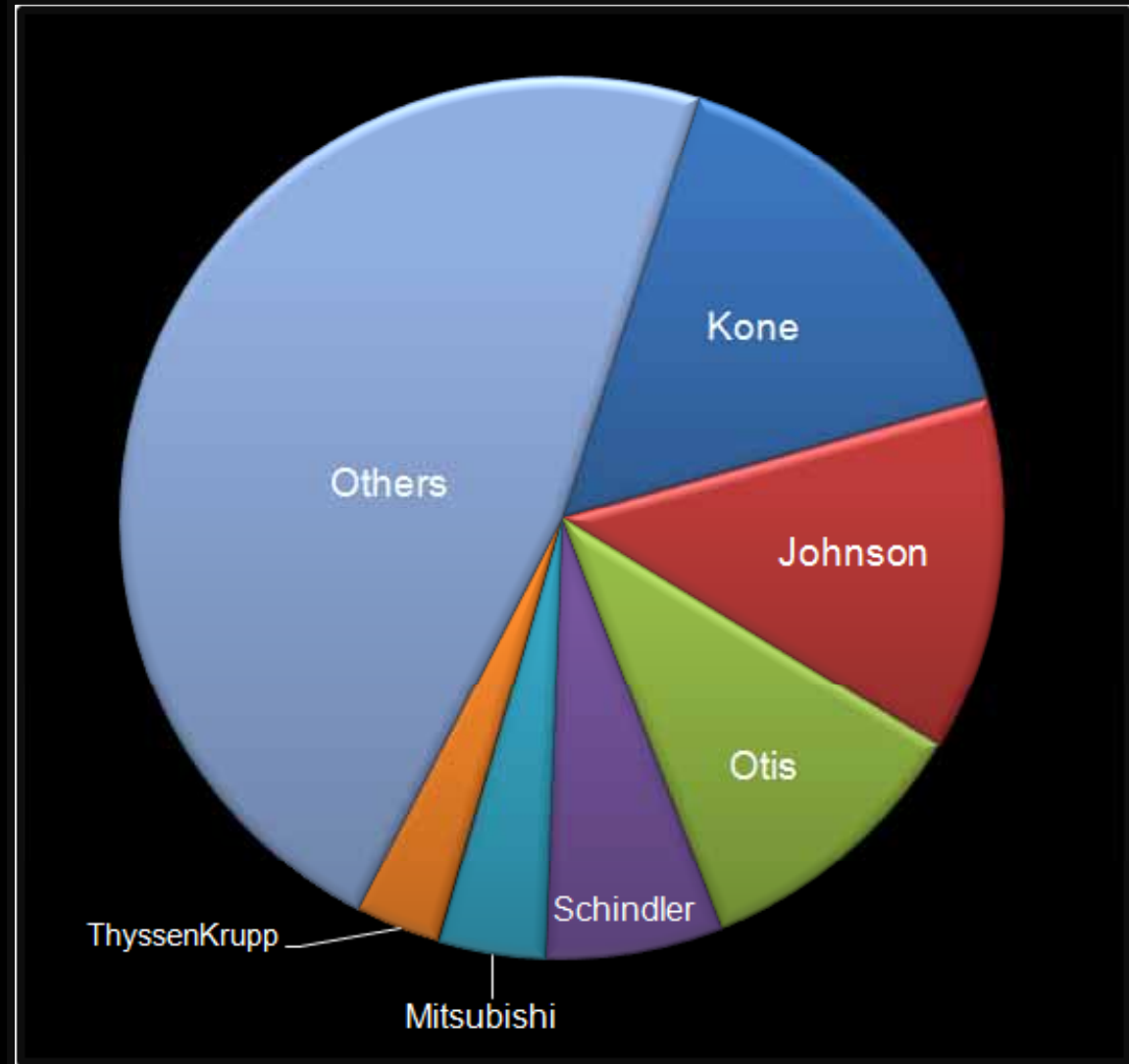


Others include

- Fujitec
- Hitachi
- Hyundai (local partner)
- Over 300 independents

TREND

- **50% of market is controlled by the 6 majors**
- **Market share of the independents is increasing**



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E & E Component / Suppliers



E&E / component majors who have set-up base or are in the process of setting up base in India

- Fermator
- GMV
- Kinetek
- Magil
- Monteferro
- Montanari
- Prisma
- Savera
- Schmersal
- TL Jones
- Vacon
- Wago
- Hitachi
- Toshiba



INDIA - A Billion Opportunities

E & E Product Sourcing



Supplier	Low end	Mid end	High end	Escalators
Otis	Own factory + local out sourcing	Own factory + China	China / Japan	China / Korea (LG)
Kone	Own factory + local out sourcing	Own factory	India (some China & Europe)	China (some from Europe / US)
ThyssenKrupp	Own factory	Own factory / Korea (DongYang) / China	Korea (DongYang) / China	Korea / China
Schindler	Local out sourcing	China	China (some Europe)	China (some Europe)
Mitsubishi	NA	Thailand	Thailand / Japan	Japan
Fujitec	NA	Singapore	Japan	Japan
Hitachi	NA	Singapore	Japan	Japan
Johnson	Own factory	Own factory (+ imported components)	Own factory (+ imported components)	China
Others	Local out sourcing + components from China / Korea / Europe / US			China



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E & E Market Trends – Positive Drivers



- EVIDENT REVIVAL
- Huge demand for affordable housing
- Continued urbanization
- Continued growth in B Class & C Class Cities (*Over 20 cities with a population over a million*)
- Taller buildings
- Infrastructure Development
 - Airports
 - Metros
- Major shift from manual door lifts



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E & E Applicable Standards & Codes



National

- Bureau of Indian Standards (IS 14665 / IS15785)
- National Building Codes (NBC 2005)
 - *are recommendatory only*

Individual States

- Implementation through State legislation / State Acts
- Inspections by electrical inspectors
 - *many states do not have a legislation*

Imported Equipment

- EN 81 / EN115 & JIS 4301 / 4302

Alignment with EN81 is the thought process



INDIA - *A Billion Opportunities*

E & E Market – Require more than approximation?



The Future of Elevator and Escalator Market in India to 2014
- A five year outlook of the Elevator and Escalator Market in India -

A Study launched by e-Research & Publications

Supported by
Virgo Communications & Exhibitions

Details available at:

Hall # 2, Booth 218, Interlift 2009



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Opportunity India



* THE ECONOMIC TIMES MUMBAI TUESDAY 29 SEPTEMBER 2009

All roads lead to India for German auto cos



Manik Mehta
FRANKFURT

INDIA, whose mode of transportation in antiquated cars, was once referred to in German industrial circles as the "world's bullock cart", is now being aggressively courted by German automakers, seen by the enormous attention it received at the International Motor Exhibition here.

Forced by their own financial problems and shrinking demand in traditional markets in Europe, Japan and the US, German car-makers are desperate to tap the new markets of the so-called Bric (Brazil, Russia, India and China) countries. Among them, India clearly stands out with a large cash-rich middle class whose appetite for luxury products, including foreign branded cars, exudes considerable pull for German car manufacturers.

So it was no wonder that India hogged the limelight this year at Frankfurt's International Motor Exhibition, popularly known by its German acronym IAA, where a special India Day was organised to highlight the opportuni-

ties and challenges of the Indian market. The 10-day IAA, which ended on Sunday, was held under gloomy economic skies as a major crisis continues to ravage West's automobile industry. As Germany's car industry continues to bleed with declining sales and revenue, more and more German car-makers feel that one "simply cannot bypass the future market India", as the president of the German Automobile Association, Matthias Wissmann, a minister in former Chancellor Helmut Kohl's government, put it.

To flesh out the market potential, Wissmann told the audience at India Day that whereas one out of two Germans drives a car, in India the ratio is 11 cars to 1,000 people. Management consultancy Deloitte predicts that by 2020, consumers will prefer small and energy-efficient cars and production will take place mainly in Asia, another reason to woo India. Meanwhile, Europe's largest carmaker Volkswagen will join forces with Japanese carmaker Suzuki, which has a tie-up with Maruti, a Suzuki executive revealed at the IAA. — IANS

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Can the E&E industry afford to be far behind?



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If even Archie has got it.....



* THE ECONOMIC TIMES MUMBAI THURSDAY 8 OCTOBER 2009

Now, Archie comics in Hindi, Malayalam

Other Languages To Be Added Soon; Co Plans Delhi Office

A NEW CHAPTER

Archie Comics plans to introduce more Indian characters, and may be open to giving their American characters some Indian touches

missed as too old-fash-
York Times called the
noting that the first edi-
00 copies, as opposed to
0. Mr Arora said the re-
s astounding: "We nor-
es of each digest, which
this one, all 10,000 got
nd part, which has just
; well.
e radical new storyline
Archie strategies. It has
d uber-agents, Creative
it the company and
s and animated films.
ons, like the 'New



Surely it is a no brainer!



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With a billion opportunities, you surely cant miss it



Gate way to the Indian E&E Market

Event: **International Elevator & Escalator Expo**

Venue: **Mumbai, India**

Date: **February 3rd to 5th, 2010**

Details available at:

Booth 218, Hall # 2, Interlift 2009

www.ieeexpo.com



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Thank you & Namaste

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