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STARCH ETHERS FOR DRY MORTARS

innovation by nature
since 1919

- LARGE FORMAT TILES
OPEN TIME, ANTI SLIP, ETC
- RENDERS (PLASTERS)
BOUNCE-BACK REDUCTION,
ANTI-SAG, ETC
- SKIM COAT (PUTTY)
WORKABILITY, STICKINESS
REDUCTION, ETC
- AND MUCH MORE

Take the **LEAD** with Avebe's state of the art, *potato-based starch ethers* for dry mortars.
Jobs get done faster, and better; resulting in **cost savings**.



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with Avebe Starch Ethers

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SOLVITOSE®

CASUCOL®

ADDILOSE®

SKIM COAT

TILE ADHESIVE

RENDER

PUTTY

JOINT FILLER

SPRAY MORTARS

Applications : Cement
Skim Coat & Putty
Tile Adhesive
Manual Renders
Spray Renders
Repair Mortar

Benefits : Cement
Workability
Anti slip / Anti-Sag
Thickening
Open time
Adjustment time
Cost reduction
Bounce back reduction
Application Speed


Applications : Gypsum
Manual Plaster
Finishing plaster
Spray plaster
Joint filler
EIFS
Spot Glue

Benefits : Gypsum
Anti-sag
Thickening
Workability
Working time
Smoothness
Surface hardness
Reduce chalking
Application Speed



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* Benefits are also dependent on quality of ingredients, formulation and optimisation of blend.



OUR LONG TERM ENEMIES

Since the world began, there have been friends and enemies. For a worm, the mouse is an enemy, for the mouse, the snake is an enemy, for the snake, the mongoose & so on. Some enemies on my list are for your consideration & thoughtful evaluation.

The Heat Wave

It has killed Workers and made Engineers non-productive. The brain stops working, especially on construction sites. It is difficult

Extreme Rains

Continuous torrential rains for 15 mins are enough to break-down a city like Mumbai. Employees, cabs, trains & buses, all fall down

Viral & Allergic

Medical professionals are witnessing a large rise in complaints for viral and increase in allergies. It is growing leap & bounds.

The Web Series

It has got our remote, controls us, decides how many episodes we watch, it may allow us to take a day off in work, if story demands.

Youth Going Abroad

If every bright Indian youngster is going, how will we survive. They are all packing bags. Nobody wants to stay back. We are all alone

Short Attention Span

OTP is the culprit. Our brain is asked to use & delete information so quickly. It affects us. We have a problem in keeping focus for long.

The Reel Madness

It is mandatory. Everybody is on the floor to make a reel & post on social media. Why ?, not sure, but it must be done, at any cost.

Smart Phone Fever

Nothing can be done without it. Smart Phone has become our magic wand. We are the slaves of the Phone. Its called addiction.

Zero Reading

We do not read. Books are dead. Even a long email is left un-read. If you are reading this page, you must be different. Congratulations

The Enemy Within

Laziness, lethargy and low moral. We all procrastinate & play the blame game. Most dangerous. Kill this enemy & life will change.

I was listening to Abhinav Bindra (India's First Olympics Gold Medallist Shooter) at an event. He said something which I can never forget. "The list of my victories is long. But the list of my failures is much longer". The real winners never quit. They play the game again and keep trying till victory.

What has happened in the past is over. What will happen in the future, we don't know, then why bother. It is all about the present. Are you prepared for today ?, have you taken control over your enemies ?, you must. You will. Keep reading Drycotec Diaries.



VARAH INDUSTRIES LLP
A PAPIWAL GROUP COMPANY

Toll Manufacturing Facility

About Kishangarh : The Perfect Location



The Varah Industries LLP offers a fully automatic plant + complete laboratory, ready & commissioned at an excellent location for transport availability & on time logistics.

We can manufacture for you and deliver to your primary as well as secondary markets. Our Sand Sources (Natural), Cement tie-ups (with premium companies) & logistics partners, make us a perfect fit for all your tolling needs.

Visit us and see our establishment which is second to none in this sector.

Highlights of our Plant :

- 20 TPH, Plough Share Plant from RMX, with automatic batching, weighing & Additive feed.
- Multiple Packing Facility for valve type and open mouth bag packing.
- Fully Active Lab with all testing for plasters, pull outs, curing tanks, humi chamber & UTM.
- Large Space for Sand stocking, Finished Goods area, chemicals & vehicle loading.
- Black Box Facility is available and we can also deliver a completely ready product.
- Coming Soon – Separate White Line State of the Art Plant from Schwing Stetter in same Unit

Call us or reach out to us on 94627 03442 or gourangpapiwal@varahindustries.in
for a site visit to see our establishment (nearest airport is Jaipur)



16 17 18 October 2024
Bombay Exhibition Centre, Mumbai

EMERGING TECHNOLOGIES IN DRYMORTARS



A Conference by



Date : 18th October 2024
Venue : Bombay Exhibition Centre,
Goregaon East, Mumbai
Time : 10.00 to 13.30 Hrs

Conference Highlights

- Meet Industry Experts
- Understand Vision 2030
- Learn about the latest products & trends.
- Decoding the Adhesives
- Achieve Sustainability Goals
- Publish Conference Paper



Conference Content

Panel Discussion One :

Business of Adhesives

- Are we Overdesigning Products
- Controlling Demand & Saving Water
- Innovation in Fillers, finding Substitutes
- Issues & Challenges

Panel Discussion Two :

Game Changing Products

- Challenges in Manufacturing
- Demand & Supply
- Challenges & Restrictions
- Other Innovative Products

Panel Discussion Three :

Aspirations 2030

- Industry Outlook 2030
- Challenges & Mindset
- Working towards Net Zero
- Health & Safety

VIP Panelist



Rajesh Joshi
M.D. (STP Berger)



Nilotpol Kar
MD, Sika India



Ragesh Rawat
President (Birla White)



Narendra Mishra
President (JK Cement)



Neelesh Desai
MD, BHS Sonthofen



Uday Sanghavi
M.D. (VT Corp)



Nandan Pradhan
Director (Moon Rasayan)



Atul Kulkarni
Director (RMX)



Rajeev Gupta
Business Head (ECMAS)

VIP Panellist : Technical Experts



Dr. Arjunan P.
R&D Head
MYK Laticrete



Dr. Rachana Pandey
R&D Head
Mcon R



Dr. Jitendra Kar
Technology Leader
Pidilite



Dr. Jagabandhu Kole
R&D Head
JSW Cement



Dr. Parag Solanki
R&D Head
Sika India



Anupam Shil
Head Technical
STP Berger



Chandan Adhikary
Tech Head
Procon RMC



Pawan Dhagate
Regional
Technical Head
Hella Inframarkets



Dr. B.L. Maheshwari
M.D.
Aquaproof Ind

My Interview Diaries : The Open Compete to Sand Cones - By Atul Kulkarni (RMX)

Atul Kulkarni, Director of Readymix Construction Machinery Private Limited, famously known as RMX, who have now more than 70 successful installations in the Dry Mortar Sector, speaks out his experience about Sand Making Technologies. Drycotec Diaries shares the discussion.

Drycotec Diaries : Why are you against the “Sand Cone” or Cones build to make only Sand ?

Atul Kulkarni : I am not against Sand Cone. It is a very good equipment which uses the step type mantle technology and produces good Concrete Sand. I would like to repeat “Concrete Sand” which in most cases is 00-06 mm.

Our topic is Mortar Sand. In this case, the Sand Cone does not meet expectations. Our Belarus VSI delivers much better results & we are confident to openly challenge performance of a Sand Cone, for the production of Mortar Sand which is 00-02 mm.

Drycotec Diaries : Would you like to explain in detail ?

Atul Kulkarni : Certainly. The Cone uses a stepped mantle, reducing crushing chamber volume and working on gyration with an eccentric bushing. The Close Side Setting (CSS) is crucial, typically set at 13 mm for stability, though some claim 8 mm which risks shaft failures. It can handle feeds up to 65 mm. In our Belarus VSI, CSS is not applicable as we use 'air Cushioned technology' which produces 0-2mm sand with lower dust generation and reduces production as well as wear-tear cost.

The next big and major limitation is the shape of the particle. All mortars sand particles need to be round or cubicle & definitely without sharp edges. We openly challenge all Sand Cone manufacturers to produce the E&F % that we produce in our Belarus VSI.

Drycotec Diaries : Speaking about feed, it is good that the machine accepts top size of 65 mm ?

Atul Kulkarni : As I said earlier it is a good choice for bigger feed and bigger product. It takes – 65 mm and produces 00-06 mm. However, when the feed is at top size, the production of 6 mm sand does not exceed 15 TPH. It can further reduce if the gradation is coarser. Compared to our Belarus VSI, the production output is not only triple (35 to 40 TPH), but also dust free due to an inbuilt dust classification system, eliminating the need for a separate washing plant.

Note : this machine does not work on feed which is -10 mm because the material will just pass through like a chute. This is the 2nd major flaw of the cone because mortar sand producers often get 05-10 mm which is always extra for crushing plants.

Drycotec Diaries : So what can we conclude ?

Atul Kulkarni : To keep it simple, Sand Cone is not a good choice for the Mortar Industry. You need to understand what percentage of product is delivered to concrete and mortar customers before taking the decision. If you are focused on making sand for ready plasters & tile adhesives, please speak to us to understand about our Belarus VSI.

"Dealing with low productivity and excessive dust when using traditional sander cone Crusher?"

"Upgrade to RMX Advanced Crusher Mill for increasing productivity and reduced dust. Experience a more efficient and cleaner sanding process today."

SANDER CONE CRUSHER

Lower Production Output

Higher Dust Generation

Higher Production Cost

Irregular Shape of the M-Sand

Higher Wear & Maintenance Cost

No dust classification System
(Need of Washing Plant)

**Advantages
after
Upgrading to
RMX Crusher
mill**

RMX CRUSHER MILL

Moderate Production Output

Lower Dust Generation

Lower Production Cost

Premium quality Cubical shape (IS 383)

Lower Wear & Maintenance Cost

Inbuilt Dust Classification System
(No Need of Washing Plant)



MORE INFORMATION

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Email ID: rmxsand.westregion@rcmpl.co.in

Readymix Construction Machinery Pvt. Ltd.

Corporate office: Survey No.96/2B, Plot No.209, Fourth Floor, Near Pandit Bhimsen Joshi Park, Right Bhusari Colony, Paud Road, Kothrud, Pune - 411 038. India.

www.rcmpl.co.in

My Interview Diaries : Vatsal Maheshwari : Gen Next



Drycotec Diaries interviews a young, energetic & qualified Chartered Accountant with experience in the Audit and Assurance Department. With good academics, he had multiple options as well as opportunities to proceed in various parts of the globe.

Vatsal Maheshwari surprised his friends and well wishers by taking a decision to join the family business and breath the fine powders which are part of our dry mortars industry. His highly analytical mind also has silos which draw him towards sports and philanthropy. He has been playing sports & also teaching the under privileged students mathematics & English.

We wanted to understand him and have interviewed this next generation business enthusiast.

Drycotec Diaries : Tell us about your self and your area's of interest

Vatsal Maheshwari : I was born in 2000. That makes me a Generation Z. We are people who grew up with total digital connectivity & thinking about how AI can be used for all aspects of work. We are more pragmatic & mature in terms of technology. I am a budding entrepreneur with interest in sports and voracious reading about everything. Having a professional qualification does not stop my hunger to seek more knowledge.

Drycotec Diaries : According to you, what are the areas which need dynamic improvements in the drymortar sector ?

Vatsal Maheshwari : Gigantic changes are needed in areas of product awareness & applications. As a country we are far away from understanding the Dry Mortar Products. Our focus is towards the A class Cities which is just a small part of the country. I have observed so many low cost products getting sold in the market which creates more repair work than before. There has to be a transformational change to bring right advertising so that our industry can be recognized in the road to sustainability & climate changes.

Drycotec Diaries : What are your observations & comments on the cement industry ?

Vatsal Maheshwari : The Cement industry is booming. The full focus of government on infrastructure is leading the growth. The per capita consumption of cement in India is still far less than the developed countries. The big brands have set their net zero carbon goals. This is a very good initiative, most needed for the world. I can see more production of PPC over OPC which is actually helping us to reduce our carbon footprint, with out compromising the infra growth goals.

Drycotec Diaries : What advice would you offer to the youngsters who are planning to enter this business ?

Vatsal Maheshwari : Some of my observations lead to the following advise to youngsters,

- You must have an USP or an Idea is very much needed to succeed.
- Sky is the limit for the companies that want to work on quality products.
- You can encash next decade of growth, just join the wagon.
- Price will go down due to high supply and more players, get fit & lose fat
- Ensure there are checks in place that are equivalent to MNCs
- Diversify the business, think beyond the box.

Total Solution For Toll Manufacturing

“ WELCOME TO AQUAPROOF GROUP ”

Aquaproof Group works with a vision, zeal, and professionalism. Aquaproof Group's aim is to become a pioneer and frontrunner in its field. Aquaproof Group provides complete range of Wallcare, Tilecare, Waterproofing and Coating solutions and other building solution for building & other civil constructions. Aquaproof Group is promoted by Dr. B.L. Maheshwari, a professional; and managed by qualified and experienced professionals committed to the highest standards of corporate with 25 years of experience governance..

We invite companies nationwide to partner with us for their toll manufacturing needs.

Our Product Range

WATERPROOFING	TILE CARE	INDUSTRIAL FLOORS
CONCRETE PROTECTION	STONE CARE	INDUSTRIAL GROUTS
PUTTY	REPAIRING PRODUCT	PAINTS & COATING
PLASTER	SEALANT	CLEANING PRODUCTS
JOINTING MORTAR	WATER REPELLENT	OTHERS PRODUCTS

SOLUTIONS FOR EVERY TYPE OF CONSTRUCTION SITE

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Introduction: Welcome to QuarryForward, a conference by Quarry Owners & Suppliers collaborating to develop sustainable quarrying techniques & methods. The details below,

Date : 13th December 2024

Venue : 2nd Flr, Conference Room, Bauma Conexpo, India Expo Mart, Greater Noida.

Time : 13.30 hrs to 18.30 hrs

Time	Agenda	By
13.30 – 13.45	Lamp Lighting	Chief Guest
13.45 - 14.00	Welcome Note & Setting the Rules	Organizers
14.00 - 14.45	Debate 1 : Drilling & Blasting – Improving Productivity <ul style="list-style-type: none"> • Incorrect Blasting – Reasons • DTH & TH – Which works where • Cartridge or ANFO, which is better 	Debate by Panellist
14.45 - 15.00	Sponsor Presentation One	Sponsors
15.00 - 15.45	Debate 2 : Crushing & Screening – Increasing Efficiency <ul style="list-style-type: none"> • Importance of Feed Gradation Curve • Ensuring that the crushers are not overloaded • Flow Sheet Mistakes, check before buying 	Debate by Panellist
15.45 - 16.00	Sponsor Presentation Two	Sponsors
16.00 - 16.45	Debate 3 : Sand Classification – Saving Resources <ul style="list-style-type: none"> • The Pros & Cons of Washing • What are the limitations of Screening • Is Air Classification the Solution 	Debate by Panellist
16.45- 17.00	Tea Break	All
17.00 – 17.15	Sponsor Presentation Three	Sponsors
17.15 – 18.00	Debate 4 : Material Handling Tech – Saving Energy <ul style="list-style-type: none"> • Electric Equipment - feasible or not • Modern Drum Pulleys Pros & Cons • Solar & Wind – Have you done it 	Debate by Panellist
18.00 – 18.15	Sponsor Presentation Four	Sponsors
18.15 – 18.30	Certificate Handover to Expert Panellists	All



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DRY MIX MORTAR PLANT

Mortar | Grout | Tile Adhesive | Black Box | Putty | Green Sand



INTENSIVE MIXER



PLOUGH SHEAR MIXER

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My Plaster Diaries : Effective Plastering Cost



This table is a result of the great work done by **Mr. Vineet Chaudhry, Director, Impetus kitchens**. Mr. Chaudhry has done lot of work in the area of spray plastering and has excellent knowledge of the techniques. Drycotec Diaries is happy to publish his work as a summary and help the industry achieve the next level of quality as well as efficiency.

COMPARISION OF COSTS FOR DIFFERENT TYPES OF PLASTER MORTAR & APPLICATION			
PLASTER THICKNESS (MM)	PLASTERING AREA (SQ FT) PER DAY		
15	2000		
	SITE MIX	RMP (HAND APPL)	SPRAY PLASTER
MATERIAL			
DENSITY (WET) Kg/CuM	2450.00	2200.00	1850.00
QTY (GROSS) Kgs/Sq Ft	3.70	3.30	2.78
WASTAGE %	0.20	0.04	0.02
QTY (NET) Kgs/Sq Ft.	4.44	3.43	2.84
PRICE (INR/Kgs)	4.50	5.50	7.50
CEMENT SLURRY (INR/Per Sq. Ft.)	0.50	0.50	0.0
QTY REQ (Kgs)	8880.00	6860.00	5680.00
PERCENTAGE COMPARISION (%)	157.00	121.00	100.00
TOTAL COST OF MATERIAL/MORTAR REQUIRED (INR.)	40960.00	38730.00	42600.00
APPLICATION			
WORKERS REQ (Nos.)	40.00	20.00	9.00
WAGE RATE (Avg) INR.	850.00	850.00	1000.00
CEMENT SLURRY INR./Per Sq. Ft.	1.0	1.0	0.0
TOTAL COST OF WORKERS REQ (Nos.) IN INR.	36000.00	19000.00	9000.00
MACHINE COST PER SQ FT IN INR.	0.00	0.00	3.50
TOTAL VALUE OF MACHINE COST IN INR.	0.00	0.00	7000.00
TOTAL COST OF PLASTERING (Per Sq Ft.) IN INR.	38.48	28.87	24.80

Note : The following cost are not included : Scaffolding, site preparation, profit & overheads, insurance, welfare etc.



HAVER & BOECKER SEAL TECHNOLOGY
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SEAL TECHNOLOGY : HOW IT WORKS ?

1. The bag is automatically or manually placed on the filling tube.
2. The bag holder fixed the bag, a pneumatic sensor checks whether a bag is correctly placed, and whether it is in the correct position
3. The activation of the inflatable sleeve seals the bag valve during filling, and ensures that no product escapes between the bag valve and the filling tube during the filling process.
4. After filling, the upright bag is pushed from the filling tube into the sealing position. This process ensures that no product escapes from the still open bag valve.
5. The ultrasonic sealing unit automatically moves to the bag valve.
6. The bag valve is closed via ultrasonic sealing by pressing the anvil against the Sonotrode, heating and closing the valve with high frequency of 20,000 Hertz. The sealing time for most common types of sacks is about 0.5 Seconds.
7. After the sealing process, the ultrasonic sealing unit opens, returns to the initial position and releases the bag for discharge. A new cycle can now begin.

For more information get in touch with us at
c.gundigara@haveribauindia.com

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My Environment Diaries : Cooling it off !!!



Sanjay Chitnis, Retired Sr. Vice President (Technical Services), JK Lakshmi cement Ltd. has almost four decades of experience in the field of cement. He is an engineer from the COEP college in Pune, has done his MDI program from Indian Institute of Management, Calcutta, Indian Institute of Management, Lucknow & Indian Institute of Management Ahmedabad. He has also done his MBA from Annamalai University. Buildings in residential sectors consumed about 25 % of India's electrical energy – primarily for AC, lighting and ceiling fan. The gross electricity consumption in residential buildings has been rising sharply over the years. Increased use of split air-conditioning units in homes for thermal comfort is an important reason contributing to this rapid increase in the electricity use in residential buildings.

To promote energy efficiency in existing homes and buildings, energy efficiency star label program has been developed by BEE – Bureau of Energy Efficiency. Major home appliances covered under Standards & Labelling program are—mandatory appliances (Air Conditioner, LED lamps, Electric Geysers, Refrigerator, Colour TV, Tubular Fluorescent lamps) & Voluntary (ceiling fan, washing machine, microwave oven etc). The Eco415 Niwas Samhita 2024 is a consolidated energy conservation and sustainable building code made by BEE. BEE has given star rating from 0 to 5.

Star rating is determined on Energy Efficiency Ratio. 5 star is the best.

5 star AC details —

- 1) Better technology & hence slightly higher price
- 2) Faster cooling capacity due to high energy efficiency ratio
- 3) Higher cooling capacity
- 4) Usually have lower sound levels because they have better insulation
- 5) Produce less heat—they use a more efficient condenser (cools the refrigerant gas down to a temperature that makes it ready to be liquefied and sent to the evaporator, where it absorbs heat from the room.)
- 6) Power saving & less power bill – let us compare 1.5 ton AC.

3star AC will have 1104 W while 5 star Ac will have 840 W . If we use AC for avg. 12 hrs daily from March to July i.e. 153 days x 12hr = 1836 hours

3star AC will consume 1836 hours * 1104/1000 = 2027 units while 5 star will consume 1836 hours * 840/1000 = 1542 units.

Considering electricity charge as Rs 6/unit , power bill will be Rs 12162 for 3 star AC while RS 9252 for 5 star AC i.e. Saving of Rs 2910 for five months, for 1 lakh homes = 29 Crores

General tips for AC : Install 5 star AC

- Install air conditioner on the shady side of the building
- Make sure the air flow around it isn't obstructed.
- Adjust air conditioner louvres towards the ceiling (as cool air falls).
- When a hot day is expected, turn on the AC early rather than wait
- Switch off AC unit intermittently to prevent overheating.



R.S. ENTERPRISES

FEATURES OF SINGLE SPOUT VALVE

TYPE PACKING MACHINE (RSIP-001)



OUTPUT/HR

300-350Bags./Hr

BAG HT

26inch. (Max.)

FILLING CAPACITY

20To50Kg.

MATERIAL

Cement, Putty,
Ready mix, other powder material

POWER CONSUMPTION

5 kw and 7.5 kw
(As per material type)

ACCURACY

Our Machine Operated at ± 150 Grams
Weight Variation to Filling for Each bag.
(20 kg - 50 kg)

My Sand Diaries : The R-Sand : Baton Consultants Review



What Defines the R-Sand ?

Sand which is dredged from the bank or base of the river. Which can contain sedimental waste, fish bone and other impurities.

Why R-Sand ?

Because it is available, is round in shape, is easy to screen, is cheaper in some areas also legal, & because it has lower water absorption.

Is R-Sand Available ?

Yes in many areas. Guj, Raj, MP, TN and the entire East + North East. Bramhaputra, Ganga, Yamuna & Mahanadi deliver top quality sand.

Are the Specifications better for R-Sand ?

Comp strength is higher, water demand is lower, negligible slit content and does not crack on the wall.

Is R-Sand Environmental Friendly ?

Certainly not. It is bad for the rivers. Completely disturbs the environment, flora & fauna both.

What can we do to stop use of R-Sand ?

Raise a campaign, bring consciousness in buyers. When the buying stops, the dredging will also stop.

Some Typical Gradations of Processed R-Sand

Sample A			Sample B			Sample B		
Sieves	%age Pas	Remarks	Sieves	%age Pas	Remarks	Sieves	%age Pas	Remarks
4.75 mm	100%	Very Fine	4.75 mm	100%	Coarser	4.75 mm	100%	Medium
2.36 mm	100%		2.36 mm	99%		2.36 mm	100%	
1.18 mm	100%		1.18 mm	92%		1.18 mm	100%	
600 M	100%		600 M	81%		600 M	99%	
300 M	78%		300 M	65%		300 M	70%	
150 M	14%		150 M	25%		150 M	15%	
75 M	8%		75 M	7%		75 M	2%	

R-Sand Processing Units

Type	Trommel / Circular Motion Screen	Flip Flop Screen	HF, M Screen, (Needs Drying)
Capex	Very Low	Medium	High
Capacity	Will not exceed 5 TPH	Very High	Very High
Product Quality	Poor	Good	Good

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Apollo DryMix Mortar Plant



Apollo dry mortar plant basically consists of a drying systems, loading system, conveying & weighing system, highly accurate weighing system to mix sand, cement and additives in required proportion where it finally gets the exact composition of the required mortar. Once it is prepared, dry mortar is available for bagging & ready to be transported to market. Apollo manufactures 5 TPH, 10 TPH, 15 TPH, 20 TPH, 25 TPH, & 30 TPH capacity plants.

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India Emerges a Top Five Destination for Realty FDI

Foreign investors accounted for about 55% of investment in land and developments in Jan-March period: Colliers

Sobia.Khan@timesgroup.com

Bengaluru: India ranked among the top five cross-border capital destinations globally for land and development site investments in the March quarter with foreign investors backing about 55% of the inflows, said real estate services firm Colliers. Notably, 73% of the fresh foreign investments were aimed at ready assets, according to Colliers' latest Asia Pacific Global Capital Flows report.

Foreign investors pumped \$1.6 billion into India's realty market in 2024, garnering a 67% share.

Four of the top markets globally in the first quarter of calendar 2024 were in the Asia-Pacific region led by China, Singapore, and Australia.

"The sustained inclination of foreign investors towards ready assets is evident from the 73% investment inflows in Q1 2024. There is a persisting preference for high-quality office assets, both developmental and ready-

to-move, with a notable focus on sustainability," said Piyush Gupta, managing director of capital markets and investment services at Colliers India. "Additionally, capital in the Indian real estate sector is becoming increasingly diversified, with growing investments in residential, logistics, alternative assets, and credit."

Institutional investors in India mainly prefer completed and pre-leased income-yielding assets as they seek immediate and con-

sistent returns, low-risk profile, compliance assurance, and reduced exit-related complexities, making them highly sought-after investment opportunities.

However, with most of the large Grade A projects already funded, investors are also forging partnerships with local developers and other investors in develop-

DRAWING BIG NAMES

Top institutional investors include PAG Credit and Markets, Ivanhoe Cambridge, Logos, Alta Capital and CPPIB

mental assets spanning office, residential, and industrial segments. "India's consistent economic growth, robust demand fundamentals, and positive business outlook compared to other countries have bolstered global institutional investor confidence in exploring diverse investment opportunities in India. The inflow into developmental assets covers different stages of development, such as platform formation, land acquisition, and construction," said Abhishek Kapoor, CEO of Puravankara Group.

Over the past two years, there has been a notable increase in land investments, especially for residen-

tial projects, with major developers strategically acquiring large, contiguous land parcels. Also, institutional investments in the residential segment have seen a 20% increase in 2023 at \$0.8 billion.

According to Colliers, institutional investors like PAG Credit and Markets, Ivanhoe Cambridge, Logos, Alta Capital, and CPPIB invested in the Indian market across segments like residential, warehousing, and alternative assets.

"India will continue to attract investor attention in real assets due to the strong growth fundamentals of its economy. The country benefits from political stability and consistent regulatory reforms, which enhance predictability and confidence among investors. Additionally, the rapid institutionalisation of the sector has made it more organised and transparent, showcasing the potential for delivering superior risk-adjusted returns across various asset segments," said Chan Chakravarti, former head of indirect strategies-APAC for Ivanhoe Cambridge.

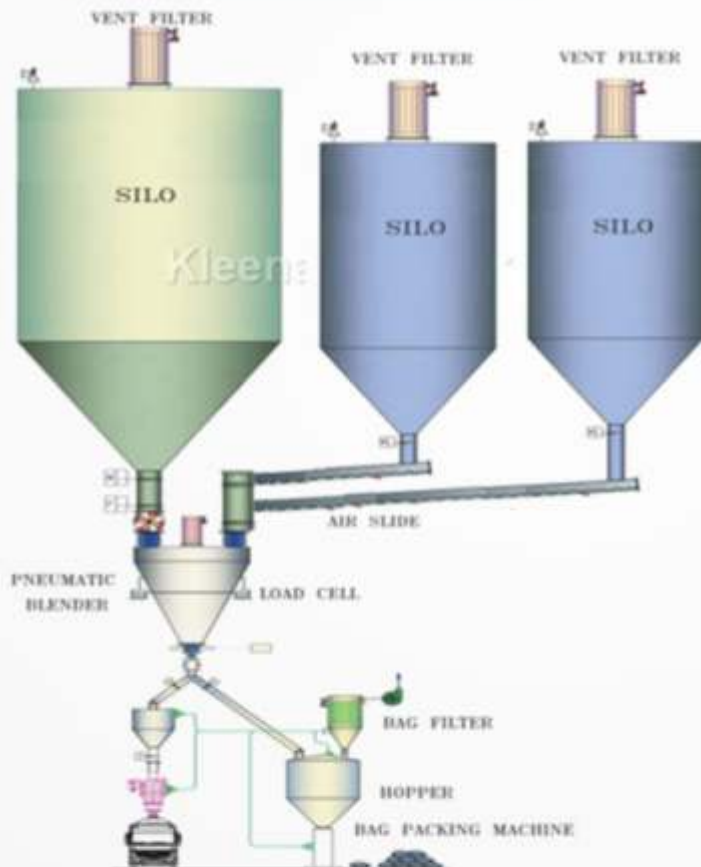


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Dr. Jai Shankar Kumar, Head (Sales & Marketing) Shyam Steel India has more than two decades of experience and has worked for some of the Top Cement brands of India. He has done his MBA from IIM Calcutta and also completed his PhD. He expresses his views on the news clips.

BUSINESS LINE, MUMBAI 10 JUNE 2024 Modest demand reins in cement rates

ON A LEASH. Extreme heat, labour shortage due to polls kept prices muted in April, May; uptick anticipated in June

Abhishek Law
New Delhi

Cement demand across India continues to be moderate with attempts at price hike yet to materialise on expected lines. Market representatives said extreme heat and shortage of labour due to the elections kept cement demand and prices muted in April and May, and some 'movement' is anticipated in June as construction activities pick up.

Pent-up demand along with pre-monsoon construction activities may aid in demand uptick from mid-June, said a cement manufacturer. However, labour shortage is likely to continue owing to the beginning of the harvest season.

PRICE CHECK

Research firm, Anand Rathi, in a recent report said attempts to hike



CONCRETE STEPS. Pent-up demand and pre-monsoon construction activities may help hike demand from mid-June

prices in various regions are being made. But doubts regarding the sustainability of these steps remain "owing to monsoons and labour shortage aggravated further by the harvesting season, coupled with high heat and liquidity constraints."

Incidentally, cement companies during their earnings call have maintained that general elec-

tions and labour shortage will have a bearing on volume and demand for Q1FY25.

Onset of monsoons would further push back recoveries in the sector to H2 (October onwards).

Some cement-makers like ACC and Ambuja Cements, JK Lakshmi Cement, among others, have guided for prices to improve from H2; there are

many which have predicted towards price stability.

"Cement prices declined by 4 per cent y-o-y and 2.5 per cent q-o-q and are currently lower by 1-2 per cent from the average cement prices of Q4FY24," Axis Capital said in a report

MARKET-SPECIFIC

In the southern markets, particularly, Bengaluru, and in the region, cement prices "were stable" with no price hikes initiated due to poor demand (down 15-20 per cent y-o-y) mainly owing to labour unavailability during the elections. No cement price hike has been announced in June.

In Chennai, while billing price remained the same, selling price was hiked by ₹50 per bag, announced in June, Anand Rathi said in its report. In Hyderabad, price hikes announced were between ₹20 and ₹40 per bag.

Across central and north India, heat and labour shortage kept demand and prices muted post March. Price hikes were reportedly announced in some markets like Indore, but they are yet to materialise.

Channel checks carried out by Anand Rathi showed prices to have declined in Kanpur and Lucknow. In Delhi, weak demand in April and May (down 20-25 per cent y-o-y) kept prices under pressure.

Moving to the markets of East India, Kolkata saw cement prices fall by ₹20-25 per bag post March on weak demand (down 10-12 per cent y-o-y). In Patna, discounts are being withdrawn whereas in Bhubaneswar, cement prices decreased, the research firm said.

In Mumbai and other markets of West India like Nagpur, dealers expect pre-monsoon demand uptick in June.

— FACTORS CONTRIBUTING TO THIS SITUATION —

The Heat Wave

Extreme heat makes it difficult for construction workers to operate safely & also affects the setting time & quality of cement.

Labor Shortages

Migrant workers return to villages during extreme weather or due to health, leaving construction projects understaffed.

Economic Factors

Cautious spending by both the public & private sectors contribute to muted demand for cement & other materials

SupplyChain Disruptions

Transport issues during peak heat periods, can further affect availability & cost of cement, impacting demand

Regulatory Concerns

Regulations regards to environmental impacts & sustainability in Const also play a role in shaping demand

Environmental Concerns

Increasing awareness for traditional cement, as builders might seek alternative materials or methods

The combination of these factors, results in a complex scenario affecting the demand.

Will it rain on cement sector's parade, again?

HARSH KUMAR
harsha.j@live.com

Cement prices have finally been raised after unsuccessful attempts in April and May. Extreme heat in the country and labour shortages due to the general election had muted cement demand in the previous two months, leading to price rufflages. In June, however, at an all-India level, average price hikes of 18-10 per 50 kg bag have been announced, a dealers' channel check by Motilal Oswal Financial Services showed.

Having peaked in October, cement prices have been on a downtrend due to heightened competition for volumes and market share, severely impacting realizations. In the March quarter (Q1FY24), the cement industry saw a volume growth of 10.4% year-on-year but a 5% sequential decline in realizations, Centrum Breaking said. The south and east markets saw a relatively higher impact on realizations as they grappled with issues of oversupply.

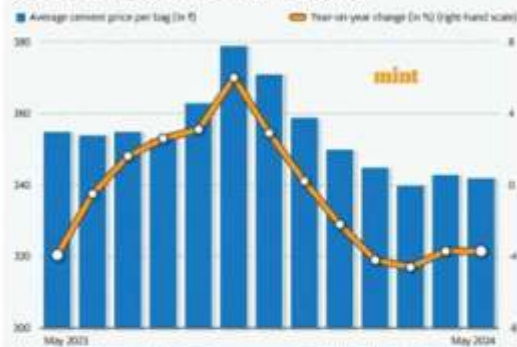
Additionally, demand prospects for H1FY25 are not bright, as highlighted by recent management commentary. Cement demand tends to be subdued in the monsoon season when home building—a key demand driver—is muted.

It remains to be seen if the recent price hikes will sustain. With the general election over, business conditions are expected to normalize. However, the September quarter is typically weak for the sector, making it tough to maintain price hikes. Further, even if the price hike sustains, it is unlikely to significantly boost realizations growth. Considering the latest price increase, the all-India average cement price is estimated to be flat sequentially in Q1FY25 (quarter-to-date), said the Motilal Oswal report on 11 June.

Against this backdrop, cement makers' continued focus on cost optimization measures such as the use of alternative fuels and investments in waste heat recovery systems, is a positive. Also, costs of key fuels such as imported petroleum

Heading south

Cement prices have been on a weak footing since October



Note: One cement bag weighs 50 kilograms

Source: Motilal Oswal Financial Services, cement dealers

PRAGATI SHARMA/HT

coke have declined sequentially so far in Q1FY25, and coal prices are stable. But this may not substantially improve the sector's near-term earnings outlook.

The industry saw an average Ebitda per tonne drop of ₹20-140 sequentially in Q1FY24, and a further sequential drop is likely in Q1FY25 due to negative operating leverage and weak cement prices, said Emkay Global Financial Services.

Meanwhile, cement demand is

expected to exceed demand in most markets, limiting sharp price improvements.

UltraTech Cement Ltd aims to achieve around 200 million tonnes per annum (mtpa) overall capacity by FY27, including Hisortam Industries and its overseas capacity. Ambuja Cements Ltd plans to reach a capacity of 140 mtpa by FY28, and Shree Cement Ltd targets grey cement capacity of 75 mtpa/80 mtpa by FY27/28.

In the last month, shares of pan-India

cement makers ACC Ltd, Ambuja, and UltraTech have risen 12-17%. It is widely anticipated that the new government's focus on infra-structure spending and capital expenditure will continue, boding well for long-term cement demand.

However, a populist bias in the Union Budget could dampen the outlook for cement stocks.

In valuations, shares of large cement makers are trading at FY26 EV/Ebitda of 11-17 times, showed Bloomberg data. EV is enterprise value. Unless prices improve meaningfully, the spectre of earnings downgrades for FY25 looms for the sector, making valuations less compelling.

HOLDING ON

CEMENT demand tends to be weak in the monsoon season when home building activities are muted

THE September quarter is typically weak for the sector, making it difficult to maintain price hikes

CEMENT makers' cost optimization measures, such as the use of alternative fuels, are a positive

expected to pick pace from Q3FY25. Companies are poised to post better volumes in H2FY25 compared to H1FY25. That said, for now, the sector is likely to close FY25 with mid-to-high single-digit (5-8%) year-on-year volume growth. Larger companies are likely to maintain their capacity addition spree via organic and inorganic routes and gain better distribution reach. Consequently, supply is

The recent rise in cement prices after two unsuccessful attempts in the first quarter of FY 2025 indicates a positive trend for the industry. This upward movement in prices can be attributed to several factors:

- 1. Increased Demand:** With ongoing urbanization and infrastructure projects, the demand for cement has been steadily rising. Government initiatives to boost housing and infrastructure development further contribute to this demand.
- 2. Strategic Acquisitions and Consolidations:** Companies like the Adani Group have been actively acquiring and consolidating their positions in the cement industry. This consolidation can lead to more stable pricing as larger players can better manage production and distribution.
- 3. Cost Management:** Improved cost management and efficiency in operations, including better logistics and supply chain optimization, help companies maintain profitability, allowing them to manage pricing more effectively.
- 4. Economic Indicators expansion:** Positive economic indicators, such as GDP growth and increased investment in construction and infrastructure, contribute to higher demand and better pricing power for cement manufacturers.

The successful price rise suggests that the market conditions are becoming more favorable, and companies are likely to see improved margins. For investors and stakeholders in the cement industry, this trend signals potential growth and profitability in the coming quarters, marking a period of optimism and expansion.

LOOKING UP

Steel, electricity push Apr core sector output 6.2%

SHREYA NANDI
New Delhi, 31 May

The output of India's eight key infrastructure industries expanded 6.2 per cent year-on-year (Y-o-Y) in April, aided by robust growth in sectors such as steel, electricity and natural gas.

In comparison, the growth in output was 4.6 per cent in April 2023. However, growth in these industries was revised to 6 per cent in March, up from the government's earlier estimate of 5.2 per cent, data released by the Department for Promotion of Industry and Internal Trade (DPIIT) showed.

The eight sectors — coal, steel, cement, fertilisers, electricity, natural gas, refinery products, and crude oil — comprise 40 per cent of India's total industrial production. As a result, they have a significant impact on the index.

Barring fertiliser, the remaining seven sectors witnessed a positive growth. However, in some of them, the high growth came on the back of a low base. Similarly, while fertiliser output witnessed a degrowth of 0.8 per cent, it was mainly due to a high base. Fertiliser output grew 23.5 per cent in April last year.

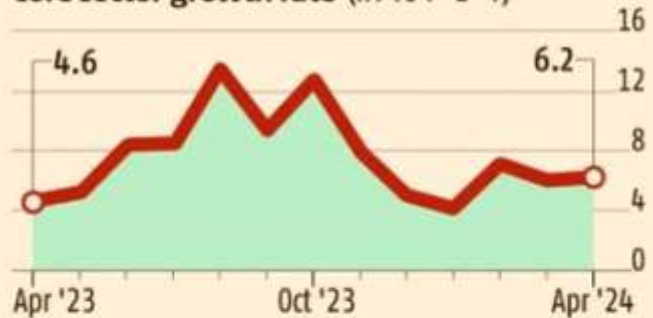
"April has been the time when there has been less focus on spending by the government given the ongoing elections. Hence, the numbers must be read with caution," said Madan Sabnavis, chief economist at Bank of Baroda.

Production of coal, crude oil, natural gas, refinery products, steel, cement and electricity witnessed 7.5 per cent, 1.6 per cent, 8.6 per cent, 3.9 per cent, 7.1 per cent, 0.6 per cent and 9.4 per cent growth, respectively, in April, as compared to the same period a year ago.

Although the cement sector saw marginal but

THE TREND

Core sector growth rate (in % Y-o-Y)



Sector-wise break-up for Apr '24 (in % Y-o-Y)



Source: DPIIT

positive growth in April, on a sequential basis, output witnessed 12 per cent contraction.

According to Aditi Nayar, chief economist at ICRA, the decline in cement output growth in April partly reflects a high base, and could also be dampened by some slowdown in government capex during the Parliamentary elections.

"The steel sector, however, displayed a healthy 9.4 per cent rise in April 2024, which may be driven by consumer durables," Nayar said.

CENTRE TO SANCTION ASSISTANCE FOR 30 MILLION ADDITIONAL HOMES

Affordable Housing Segment to Get Further Boost on PMAY Extension

Govt move to have a multiplier effect on the economy by stimulating growth, creating jobs

Kallash.Babar@timesgroup.com

Mumbai: The Centre's decision to give financial assistance for the construction of 30 million additional housing units under Pradhan Mantri Awas Yojana (PMAY) is expected to augment supply of much-needed affordable housing and move closer the government's vision of providing housing to all.

The decision by the Modi government in its third term is expected to have a significant multiplier effect on the economy given the realty sector's linkages with over 250 ancillary industries. The government had launched the PMAY mission in June 2015.

"Real estate, being the second lar-

A Roof Over Your Head

20 million Homes for which support was guaranteed in interim budget

PMAY allocation up at **₹80,671 cr** for FY25

₹1 lakh to ₹2.67 lakh Centre's contribution for each house under different verticals of the scheme

Experts pushing for sops for development cos, buyers via interest rate subventions

Over **42.1 million Houses** completed under this scheme over the last decade



BHAVIN G

gest employer in the country, stands to benefit significantly from the extension of the PMAY scheme, which will stimulate job creation and boost economic growth. By addressing fundamental housing needs, PMAY contributes to broader goals of social equity and sustainable development, ensuring a better quality of life for all," said Jaxay Shah, chairman, Quality Council of India & CMD, Savvy Group.

He said building new houses in urban and rural areas, and enhancing last-mile connectivity through infra projects, is expected to open numerous untapped markets, driving further development and investment opportunities. In the interim budget in February, finance minister Nirmala Sitharaman had announced support for building an extra 20 million homes in 5 years under PMAY-Gram-

in (PMAY Rural). Budgetary allocation for PMAY was also increased to ₹80,671 crore for FY25 from ₹79,590 crore last fiscal.

Under PMAY scheme, the Centre gives financial support to implementing agencies in states and union territories as well as central nodal agencies (CNAs) for providing houses to all eligible families and beneficiaries. According to the government, over 42.1 million homes have been built under this scheme over the last decade.

Experts are also pushing for incentives for development companies and buyers through interest rate subventions. "While the government has recognised the need to support users under the scheme, we recommend that it also consider expanding the quantum of incentives...This segment, which experiences a limited benefit from government schemes like PMAY and lower GST rate, has experienced a steady slowdown in demand over the last 6 quarters due to recent economic pressures," said Shishir Bajaj, CMD, Knight Frank India.

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