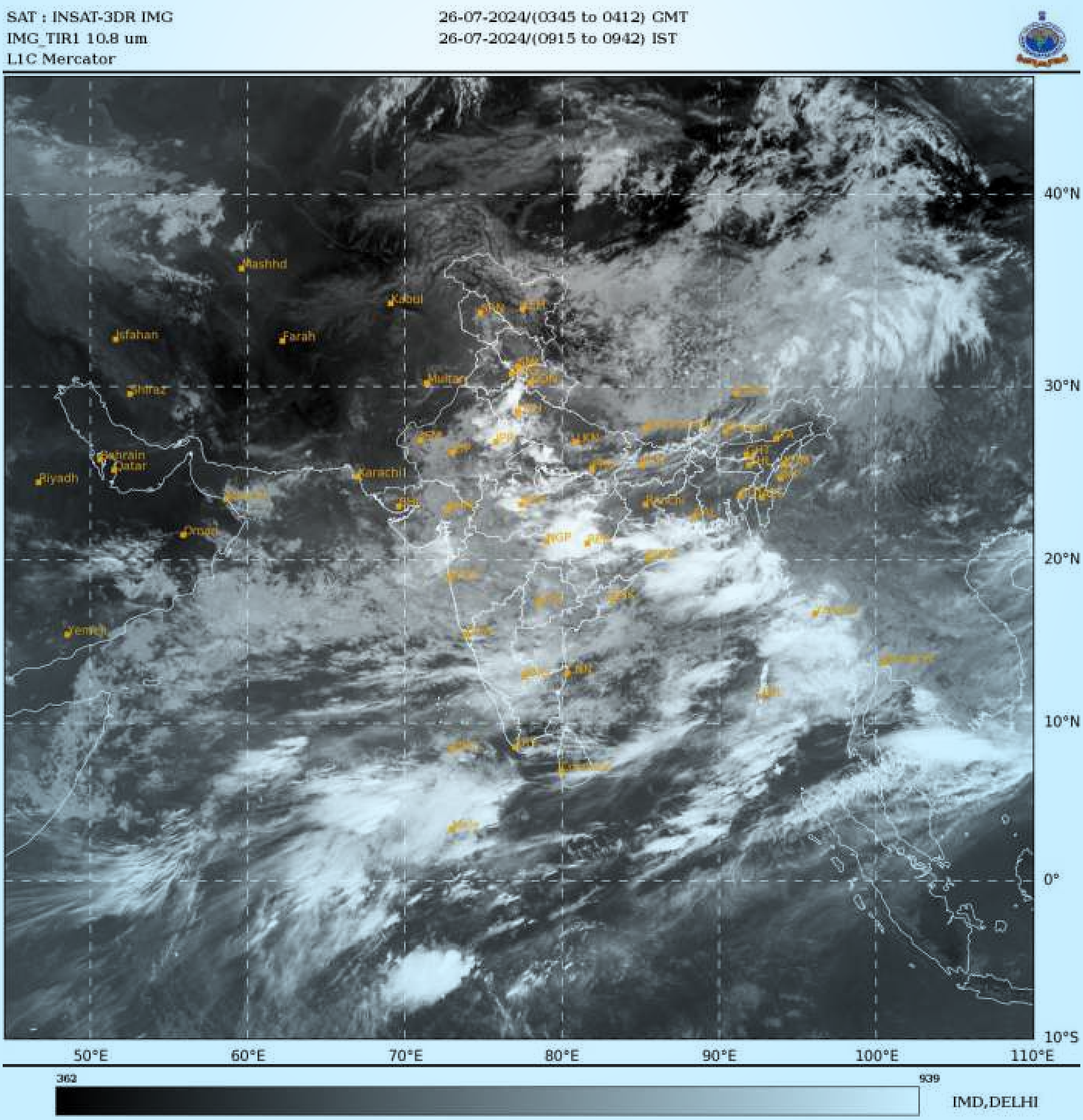
DRYCOTEC

AUGUST 2024 EDITION
(For Internal Circulation Only)

Drycotec Diaries



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Application Speed




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Editor's Page :

Some fundamental things that you should know about, else the world will laugh. I always have this experience, when the young generation laughs at my lack of knowledge. This is happening because the world is changing so fast, and it is becoming more and more difficult to catch up. Read some of these things that you may or may not know. In case you don't, good I told you and so hopefully Gen Z will not laugh at you. If you are a Gen Z reading this article, you may laugh at the low level of things which are written. It is okay, we will not mind.

CONCEPT	WRONG ANSWER	CORRECT ANSWER
DARK STORE	A store without Lights. Perhaps the one that sells drugs.	A store that caters to only on-line & in a non-display location.
CHATBOT	Somebody who chats too much. Perhaps an old lady.	It is a computer program that can answer your questions
AR	Annual Returns, to be filed. Or Accounts Receivable, risk.	Augmented Reality, a real like experience, look & feel
BIG DATA	Data for Big people. Or Data of big companies.	Data which is very very large, diverse, unstructured etc.
CLOUD KITCHEN	Name of a restaurant. Ice Cream or Falooda shop.	Made for online delivery of any restaurant, no walk-ins
CTR	Famous Dosa restaurant in Bangalore.	Click Through Rate, no of people who clicked your post
BRICK & MORTAR	Masonry Raw Materials. This one is very simple.	It is the term used to mention a physical store, real not virtual.
HEADLESS COMMERCE	Somebody who failed in BCom. Poor Commercials	It splits the front end from back end in e-Commerce to make changes
UX	Some Sci-Fi movie or medicine or a Vaccine or an Antibiotic	User Experience, ease of use, perception & efficiency
COOKIES	Yummy. To be eaten with tea or coffee, I like chocolate flavor.	A computer file that sends all information when you visit a website

The list is endless. It is best to keep a search engine around and check it before making a fool of yourself. Actually, I don't mind them laughing at me. It is okay. No big deal. One day they who laugh will face the next generation, who will laugh at the laughfers. The wheel will keep churning.

But you keep reading Drycotec Diaries and I will keep writing what comes to my mind. After all our experience comes from learning new things & this is how we all become wise.

Dr. Mandar Chitre
Editor & Founder – Drycotec Diaries
Drycotec Drymortar Association

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Venue : Bombay Exhibition Centre, Goregaon East, Mumbai
Time : 10.00 to 13.30 Hrs

www.woc-india.com

Conference Highlights

- Meet Experts of the Industry
- Understand their Vision for 2030
- Learn about the latest products & trends.
- R&D Specialist decode the challenges of Adhe sives.
- Help you achieve your goals for Sustainability.
- Become part of the Paper which shall be published.

Conference Content

Panel Discussion One : The Business of Adhesives

- Become part of the Paper which shall be published.
- Are we Overdesigning Products
- Controlling Demand & Saving Water
- Innovation in Fillers, finding Substitutes
- Issues & Challengers of the Industry

Panel Discussion Two : Dry Concrete & Other Game Changing Products

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

Panel Discussion One : The Business of Adhesives

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

Focus on

- What is the Future of Tile Adhesives ?
- What will be the new products ?
- What are the leaders thinking about 2030 ?

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 (Mcon Rasayan)

Atul Kulkarni
Director (RMX)

Rajeev Gupta
Business Head (ECMAS)

Debashish Vanikar
Chief Executive Officer
(Adhesives &Const Chemicals)
Kansai Nerolac Paints Ltd.

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
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Hella Inframarkets

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

Dr. S.B. Hegde
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What : Study of Minerals
Why : Product Development
How : Test your Sand

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My Interview Diaries :

COLA WARS ARE OVER – COMING SOON : CEMENT WARS !!!

Drycotec Diaries interviews **Dr. Bajarang Lal Maheshwari, CMD of the Aquaproof Group of Companies & IP President of the CCMA (Construction Chemicals Manufacturing Association).** We wish to put forth his views about the process of our industry.

Drycotec Diaries : What would be your predictions for the next few years in the Dry Mortar ?

Dr. Maheshwari : I foresee something like the war between Coke & Pepsi happening in our industry. Cement, which is a prime raw material in all Dry Mortar Products, is witnessing a consolidation which will lead to a fierce war. This war may change the dynamics of the industry and the way we are working. Dry mix mortar market is growing around 37% Pa .

Drycotec Diaries : Why do you feel so, what is the statistics ?

Dr. Maheshwari : The story begins with Adani group acquiring the big cement brands (ACC, Ambuja & Sanghi panna cement). Ultratech which is our largest Indian Cement manufacturer has added 50 MTPA in the last 5-6 years. As per the article in Times of India, which is attached to this interview, it is very clear that both companies have a strong capex budget and will reach a significant target. Ultratech is planning to augment its capacities to 200 MTPA by 2027, whereas Adani will reach 140 MTPA by 2028 and they will add more to reach at the same level. It is also interesting to acknowledge that India consumed only 300 MTPA in 2023 and is projected to witness a double digit CAGR each year.

Drycotec Diaries : What would be the effects of this Cement War ?

Dr. Maheshwari : Every war has a victory, defeat and large amount of damages to both sides as well as the overall environment. Let us recall the famous battle of Kalinga, where the entire river turned red due to the bloodshed. The effects of war are never good even of the winner who bleed equally. Coming back to our cement wars, the pressure of other manufacturers like Shree Cement, JK Cement and others will be intensely high. Price wars are definitely going to happen & would benefit the mortar industry on a short term basis. It is our concern that cartel should not happen which is also illegal and harmful of the industry.

Drycotec Diaries : What about the White Cement which is our putty component ?

Dr. Maheshwari : It is not the white cement, but the white Dolomite which is my major concern. A good quality putty needs 88-92% white Dolomite which is getting scarce in supply. Dolomite is a mineral $CaMg(CO_3)_3$ is a widely available mineral in India. However not all the Dolomite is white in colour, or as per the colour demanded by the putty. Our thirst for whitest Dolomite is leading to deeper mining and more wastages, leading to mine tailings. We certainly need to think beyond white putty.

THE ECONOMIC TIMES | MUMBAI | FRIDAY | 14 JUNE 2024 | WWW.ECONOMICTIMES.COM

Birla Grp Cements Lead, Adani Plans Taking Shape

Both groups lining up extensive budgets to aggressively expand capacities, acquire companies as demand expected to remain strong

Nikita Periwal & Kala Vijayraghavan

Mumbai: The battle for leadership in the cement sector, say watchers, may intensify with the Adani group announcing ambitious future expansion plans, but for now the Kumar Mangalam Birla group has seemingly consolidated its position with a 23% stake in India Cements, expanding its footprint in the country's biggest regional market with among the highest per capita incomes.

While the Adani group has unveiled a $3-billion war chest aimed at expanding through acquisitions in the cement sector, the significant gap between the Birla group and its nearest competitor remains a formidable challenge. UltraTech's annual organic capex has been estimated to be $1-1.2 billion.

"It has been Birla group's strategic initiative and efforts over 30 years to get UltraTech to reach the 100 MTPA capacity. In fact, 50 MTPA has been added in just 5 years and in the last 12 months alone, UltraTech has added about 19 million tonnes of capacity. Leadership position is not an overnight development," said an official close to the development.

Both the Birla group and Adani group did not comment.

"There was pressure on the Birla group to quickly announce something after the announcement from Adani's last week," said an analyst with a domestic brokerage. "While they are likely to retain the leadership position, the gap between the two could reduce," he said.

While UltraTech aims to reach a capacity of 200 million tonnes by March 2027, Adani Cement – consisting of Ambuja Cements, ACC and Sanghi Industries – aims to reach the 140-million-tonne mark by 2028.

Adani Cement, though, is reportedly looking at a capacity of as much as 180 million tonnes by 2028. According to cement industry officials, the Adani group may continue to seek opportunities to raise its heft in the sector through the inorganic route.

The top two players in the industry are not only aggressively expand capacities, but have also routinely opted for the inorganic route, with the latest coming from Adani Cement, which is set to acquire South India-based Penna Cement, which has a capacity of 14 million tonnes.

"The pace of consolidation has gone up very significantly in the last 2-3 quarters, and this seems to be driven by 2-3 factors. One is market share, the second is the regional diversification, and the third is the reserve captivity — the kind of limestone reserves companies have," said Sehul Bhatt, the director for research, CRISIL Market Intelligence and Analytics. "The strong underlying demand, meanwhile, has continued, which ensures that capacity utilisation for the sector will remain high," he said.

India is the second largest producer of cement in the world, and with most sectors which drive demand expected to continue seeing a growth, the sector is seen growing between 6-7% on a compounded growth basis over the next five years, experts said.

The top five players in the country are in fact, seen commanding more than half the market with a share of 56% by March 2026, ICRA said in a recent report.

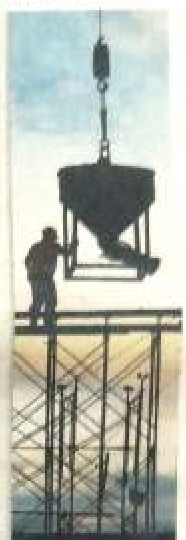
Why Cement Biggies Like to Take Inorganic Route to Grow

Producers add capacities avoiding challenges related to land acquisitions, get ready access to inputs like limestone reserves

Prominent Cement Deals of Last Decade

Acquirer	Seller	Acquired Capacity (MTPA)	Deal Value (₹crore)	Year
UltraTech	Jaiprakash Associates	21.2	16,600	Feb-16
UltraTech	Binani	6.25	7,950	Nov-18
UltraTech	Century	11.4	Share Swap	Oct-19
UltraTech	Burnpur cement	0.54	170	Nov-23
UltraTech	Kesoram Industries	10.8	7,600	Dec-23
Adani Group	ACC & Ambuja (Holcim Group)	68	81,400	May-22
Ambuja Cements	Sanghi Industries	6.1	5,000	Aug-23
Ambuja Cements	Penna Cement	14	10,420	Jun-24
ACC	Asian Concrete & cements	2.8	425	Jan-24
Birla Corporation	Reliance Cements	6.6	4,800	Feb-16
Dalmia Cement	OCL	6.7	Share Swap	Nov-16
Dalmia Cement	Murli Industries	3	400	Dec-17
Dalmia Cement	Kalyanpur Cements	1.1	350	Jan-18
Dalmia Cement	Jaiprakash Associates	9.4	5,700	Dec-22
Nuvoco Vistas	Emami Cements	8.3	5,500	Jul-20
Nirma	Lafarge India	11	9,300	Jul-16

Compiled by Centrum Broking



ET ANALYSIS

Rajesh.Naidu@timesofindia.com

ET Intelligence Group: In commodity sectors, big companies become bigger to stay relevant by following a dual strategy of acquiring peers while expanding organically. Over the past eight years, India's cement sector has been in a consolidation phase. It started with the acquisition of 21.2 million tonnes (MT) cement assets of Jaiprakash Associates by UltraTech in February 2016 for ₹16,600 crore.

This was followed by more prominent deals in recent times. In 2022, Adani Group acquired ACC and Ambuja Cements from Holcim. The acquisition of ACC-Ambuja cement assets was valued at ₹81,400 crore.

Other deals include UltraTech Cement's acquisition of cement assets of Century Textiles and Kesoram Industries, Nirma acquiring Lafarge's assets and Dalmia Cements acquiring cement assets of Jaiprakash Associates.

The inorganic route to grow capacity has gained popularity given its advantages. On average it requires a capital expenditure worth ₹800 crore to set up a cement plant of one million tonne capacity. Besides, there are challenges related to land acquisition and finding the right location with easy access to limestone reserves. Given these factors, big companies find it more convenient to acquire assets.

India's largest cement manufacturer UltraTech Cement has acquired 54MT through acquisitions over the past seven years. The company plans to add 63MT between FY21 and FY26.

In the past seven to eight years, the Birla Group has added 54MT capacity through acquisitions. The total value of these deals was over ₹32,320 crore. The Adani Group has 90.9 MT capacity through acquisitions. The total value of these deals was ₹97,245 crore. Lastly, Dalmia Cement added 20.2 MT. The value of these deals was ₹6,450 crore.

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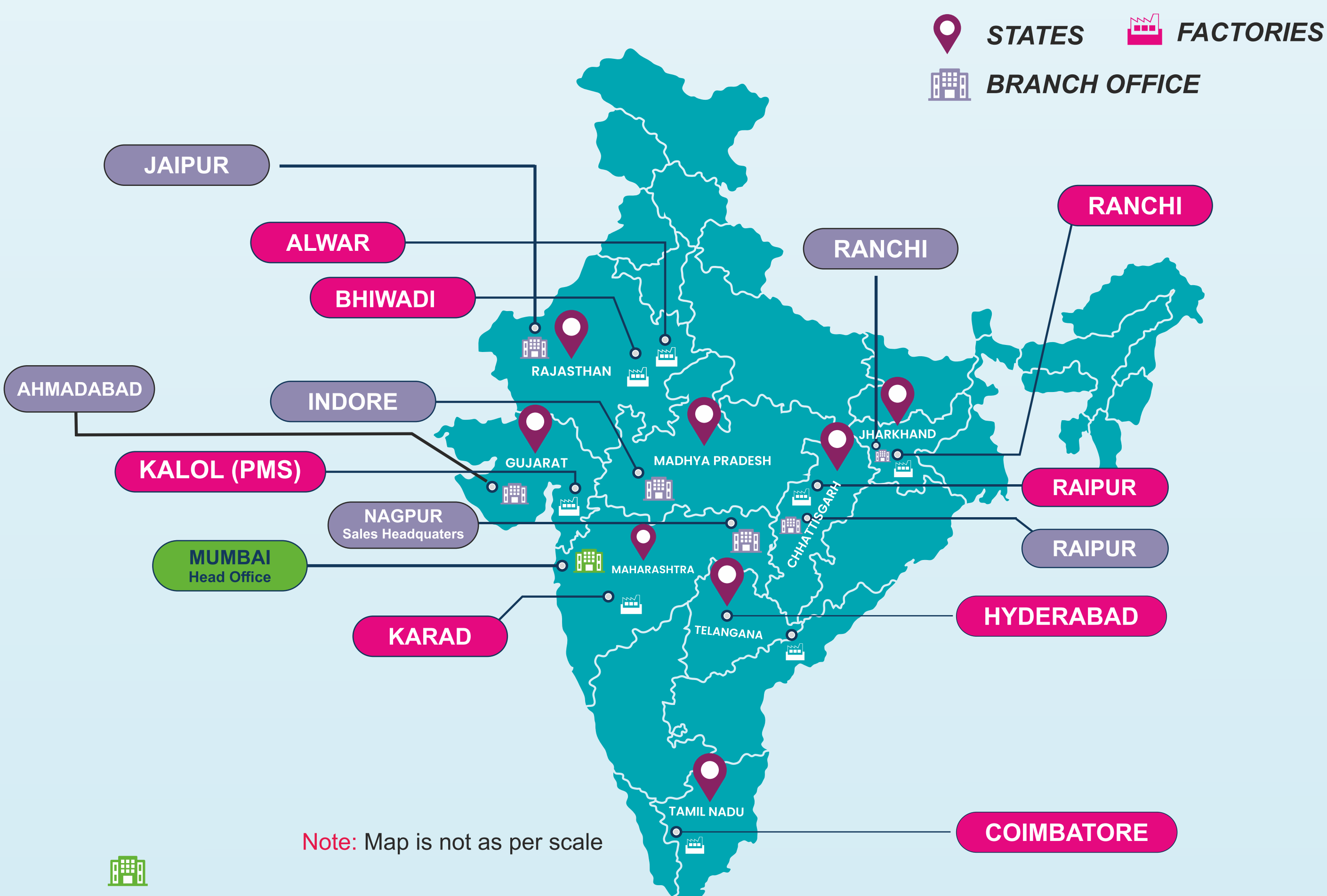

Note: Map is not as per scale

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- **CHHATTISGARH :** *RAIPUR*
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MORE INFORMATION

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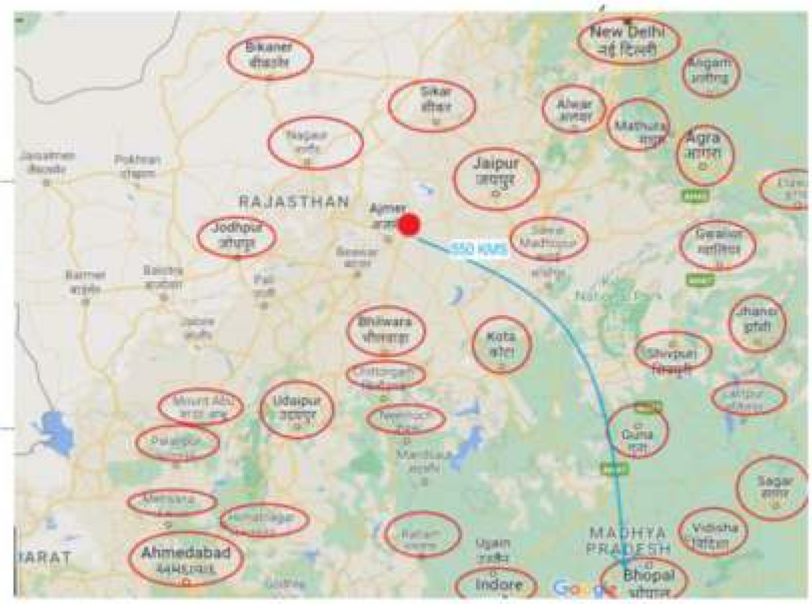

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My Green Diaries : A Critical Analysis of Carbon Monoxide Control in Cement Manufacturing

This article is written by **Dr S B Hegde,** He is a **Global Cement Consultant & a Professor in JCET Hubali** as well as **Pennsylvania State Univ, USA**. His tenure as President - Manufacturing (Cement Industry) has created an experience which help him achieve the award as the Global Visionary.

The cement industry, essential to global infrastructure, faces substantial challenges in controlling carbon monoxide (CO) emissions from kilns. Kilns, operating at temperatures exceeding 1,450°C, rely on various fuels, including coal, petcoke, and alternative fuels. Incomplete combustion in these kilns leads to significant CO emissions, with the global average being approximately 20-25 kg of CO/ ton of clinker produced. Elevated CO levels in kilns can compromise clinker quality. High CO concentrations are often associated with the formation of free lime and under-burnt clinker, which adversely affect the final strength of cement.

For instance, maintaining optimal combustion conditions can enhance the mineralogical composition of clinker, particularly the formation of alite, crucial for early strength development. A study published in the Journal of Cleaner Production (2023) highlights that precise control of combustion parameters can reduce free lime content by up to 15%, thereby improving overall clinker quality.

Safety is a critical concern in cement plants due to the risks associated with CO exposure. A recent survey by the Cement Sustainability Initiative (CSI) found that plants equipped with CEMS reported a 30% reduction in CO-related incidents.

The specific heat consumption (SHC) in cement manufacturing is significantly influenced by CO emissions. On average, cement production requires 3.3-3.6 GJ per ton of clinker. The International Journal of Energy Research (2022) demonstrates that optimizing combustion efficiency can reduce SHC by up to 10%, leading to substantial energy savings and lower CO emissions. Optimizing combustion involves precise control of air-to-fuel ratios and maintaining appropriate flame temperatures. A 2023 study by the American Concrete Institute reported that switching to alternative fuels can decrease CO emissions by 20-25%.

In the context of India, with over 500 million tons of annual cement production, Indian plants must adopt advanced technologies and practices to meet stringent emissions standards set by Central Pollution Control Board . Recent initiatives, such as the introduction of low NOx burners and staged combustion techniques, have led to a 15% reduction in CO emissions in several Indian cement plants.

In conclusion, the adoption of advanced monitoring systems, optimized combustion processes, and alternative fuels are pivotal steps toward achieving these goals. As we strive for a sustainable future, the cement industry must lead by example in reducing CO emissions and improving overall plant performance.

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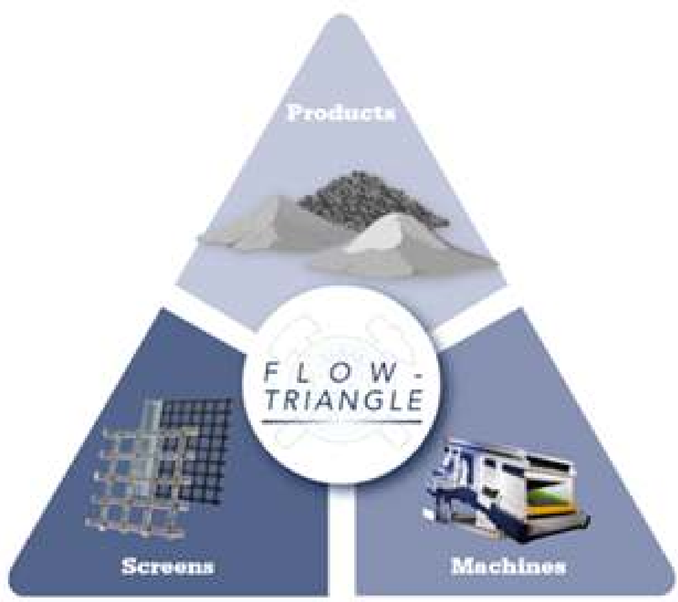

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My Environment Diaries : Water Proofing !!!

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. As the rainy season starts, we face problems of leaky roofs .There are n number of materials are available in the market including online platform. Whenever we face water leakages in roof, wall or basement, it is highly important to know the source of leakage so that treatment can be made accordingly.

Let us understand commonly available --- Polymer water proofing

Polymer waterproofing uses hydrophobic polymers to repel water and create a water-resistant layer. Polymers can be acrylic or latex-based and come in liquid, powder, or pebble form. They can be mixed into concrete or added to cement as a coating.

Latex is a common additive to cement-based waterproofing systems, improving their flexibility and waterproofing properties. There are two main types of latex used:

1. Styrene-Butadiene Rubber (SBR) latex: This is the most common type used in cement-based waterproofing. It improves flexibility, adhesion, and water resistance.
2. Acrylic latex: This type offers excellent water resistance, flexibility, and durability. It is often used in more demanding applications, such as waterproofing basements and foundations.

Latex-modified cement-based waterproofing systems offer benefits like:

- Improved flexibility and crack bridging
- Enhanced adhesion to substrates
- Increased water resistance and durability
- Reduced shrinkage and cracking

When latex is added to cement, it forms a more flexible and waterproof matrix, making it an effective solution for various waterproofing applications.

The proportion of latex to cement in a latex-modified cement-based waterproofing system can vary depending on the specific product and application.
- Typical ratio: 10% to 20% latex to 90% to 80% cement (by weight)

It's important to note that the exact ratio may vary depending on the specific product and the desired properties of the final mix. Some products may have a higher or lower recommended ratio, so it's always best to consult the manufacturer's instructions. Surface preparation is important for better results-- Clean & clear surface by applying wire brush on the affected area.

Use a suitable mixer, such as a drill-mounted mixer or a mortar mixer, to ensure thorough mixing & mix it for minimum 3 minutes. Apply the mixed material within the recommended time frame, usually 30 minutes to 1 hour. It's important to note that site mixing may not always produce the same level of quality and consistency as factory-prepared products.. Always consult the manufacturer's instructions and take necessary precautions to ensure proper mixing and application.

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Realty Project Completion Gets Faster Now, Thanks to Tech & Stricter Rules

Smaller projects being completed in 4 yrs on avg; larger ones in 4.9 yrs: Anarock

Faizan Haldar

New Delhi: Real estate developers have been completing large-scale projects in under five years since 2014, a marked improvement from the previous six-year timeframe, due to modernised construction technology and the implementation of the Real Estate Regulatory Authority (RERA), ensuring home buyers receive their homes on time, according to a report by a real estate consulting firm.

In the top seven cities, the average completion time for smaller projects of fewer than 500 units is now four years, while larger projects with more than 500 units take about 4.9 years to complete, as per data from Anarock.

The market share of large and listed developers has also increased significantly, contributing to the timely delivery of projects, the report noted.

"Large and listed players account for nearly 34% of the market today. The stringent rules imposed on project delays by the regulatory authorities have also been a key factor in reducing the completion time," said Anuj Puri, chairman of Anarock Group.

When it comes to completing large

ISTOCK

projects, the top southern cities were ahead of their northern, western and eastern counterparts.

For all large projects launched and completed between 2014 and H1 2024, the average completion time was lowest in Chennai at 3.6 years, while Hyderabad and Bengaluru clocked in at 4.2 and 4.8 years, respectively.

"For most large projects in NCR and MMR, developers had purchased land outright, thereby compromising their overall financial health and delivery capability. On the other hand, most projects in the main southern cities are joint developments where landowners usually get a certain share of the developed units," said Puri.

In the NCR, extreme weather conditions and the statutory restrictions imposed on construction when pollution levels rise also affect construction timelines in the region. Most developers have gradually reduced their leverage and, with stronger financial conditions, are able to focus on execution.

At 36%, Chennai has the highest reduction of construction time among the top seven cities, despite incessant rains during the monsoon season causing major challenges.

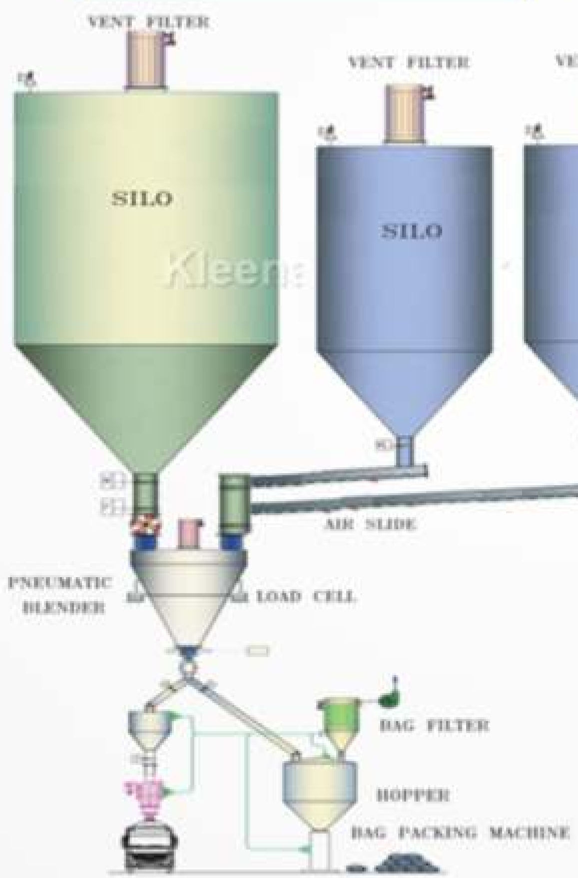
In Kolkata, large projects launched and completed between 2014 and 2024 took the longest average time to complete, at 5.7 years. Construction time will further decrease as larger projects gain momentum across cities and implement new construction technology, said experts.

Continuity of execution across major projects is becoming a big factor for financially sound developers whose sales volumes have enabled continued cash flows, they added.

Kleenair
Systems P. Ltd.

PNEUMATIC CONVEYING AND BLENDING SYSTEMS (BATCH TYPE)

Excellence in SOLID & POWDER HANDLING SYSTEMS



Kleenair Systems Pune has an excellent pilot plant, having the following features:

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- Pneumatic blending (Batch type).
- Twin shaft blender batch type

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My Cement Diaries

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.

Weak demand in the first quarter of FY25 is expected to significantly impact cement companies. Several factors might contribute to this decline - including economic slowdown, reduced infrastructure spending, seasonal variations, and market saturation in some areas.

Lower construction activities and delays in projects can also lead to decreased demand for cement, affecting the companies' revenues and profitability.

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

ECONOMIC TIMES, MUMBAI 18 JULY 2024

Weak Demand to Hit Cement Cos' Q1 Show

Competitive intensity, inability to raise prices to keep operating profit flat for industry

Rajesh Naidu

ET Intelligence Group: Cement demand in the June quarter was impacted by the heat wave, a decline in the pace of construction activities during the general elections in April and May, shortages of labour and unseasonal rains in some regions. As a result, the average all-India cement price fell by 3% year-on-year to ₹348 per 50 kg bag during the quarter.

Cement makers have not been able to raise prices in any of the months since November 2023. This has prompted them to focus on volume growth, which will likely increase the competitive intensity.

According to estimates of seven brokerage firms, sales volume at the sector level is likely to improve by 3-4% year-on-year during the quarter. Among the large cement makers, UltraTech Cement's volume growth is expected to exceed the average sector growth driven by its focus on gaining market share and consistent capacity addition. The country's largest cement manufacturer is likely to clock 5-6% volume growth for the June quarter.

Besides, during the quarter, prices of key raw materials including pet coke and coal fell by 9-10% from the year-ago levels. This may result in savings of ₹40-60 per tonne. But in the broader scheme of things, the lower cost of key raw materials will not amount to substantial gain for firms as cement prices continue to trade lower when compared historically. Analysts estimate that large cement companies are likely to save 6-8% on manufacturing a tonne of cement.

The operating profit or earnings before interest, taxes, depreciation, and amortisation (Ebitda) per tonne for the industry is likely to remain flat at ₹871 per tonne from the year-ago quarter.

Revenues of the listed cement companies are expected to either fall by 4-6% or show a marginal growth of 1-3% in the June 2024 quarter while net profit may drop by 4-9%.

Let your Sales Targets Break the Roof !!! : Report by Baton Consultants Review

Calculate your Sales Target

In my opinion, there are 3-4 ways.

- Forecast from Sales Person
- Competition figures
- Statistics
- Market news

This year, most of the companies who are manufacturing building matrials are doing very well. You can see that the market size is increasing. This is beyond the metros. Even B & C class locations are showing growth in construction activity. These are good times for us. Please the accelerator and give yourself a dream number.

Management Theory on Business Growth

There are 4 ways to grow your business as per the Ansoff Matrix. First, Penetration (Same Market, Same Product), second Market Development (New Market, Same Product), third Product Development (Same Market, New Product) & last Diversification (New Market, New Product).

In my opinion, the first option leads to more price wars & the fourth option leads to increase in risk. The second & third are the most prefered solutions. Contact us to get ideas for new products & fill up gaps in the empty areas (pockets where your presence is zero). We will help you set you channels.

It is all About People

Hire More People, you will need them. Also very important is the process of succession planning. The growing market always leads to poaching. Take care of your performing employees & keep freshers coming in on a regular basis. What is your people Turnover rate ?, more than 20% - not a good sign. Less that 2%, perhaps a bad sign. You need to tighten the slack. Let us speak about the famous Bell Curve. Separating the Performers into High, Average & Poor, helps in doing an analysis. The tough part is to convert the poor performers. Root cause Analysis will always help.

Our Services

Baton can offer you the following Services

a. Performance Management System
b. Business Gap Analysis & Closures
c. Training of Employees on Tech & Soft Skills

Home Sales Hit 11-year High in H1, Set to End '24 with a Bang

173,241 flats sold in top 8 cities despite higher loan rates, launches hit 10-year high: Report

Our Bureau

In Top Form

Launches in Jan-June marked 6% rise from year earlier

Prices up **1-9%** year-on-year

Bengaluru prices up **9%; Mumbai, NCR, Pune** up **4%** each

Quarter-to-sell* level improves to 5.9 quarters from 9.5 quarters in H1 2021

Residential units priced over **₹1 cr** & above constituted **41%** of total sales

*Quarter-to-sell (QTS) level is time required for inventory liquidation

BHAVIN G

Mumbai: India's housing property market is setting new benchmarks with robust growth in sales volume supported by stable economic conditions and continued confidence in the market's resilience despite higher loan rates and property prices. Top eight cities including Mumbai, Delhi-NCR, Bengaluru, Pune, and Hyderabad are leading this uptrend, helping the country's residential real estate market scale an 11-year high in sales volume in the first six months of 2024.

Total sales across the top eight cities recorded 11% on-year growth at 173,241 apartments, showed data from Knight Frank India. Development activity has intensified to tap surging demand for residential properties. The total 183,401 units launched during January-June marked a 6% rise from the year earlier and a decadal-high in terms of units launched in a half-yearly period.

"India's property market has been buoyant in the last few quarters owing to the strong economic fundamentals and stable socio-political conditions. Consequently, the two biggest segments of the realty sector — residential and office — have recorded decadal-high performance, said Shishir Baijal, chairman and managing director, Knight Frank India.

He expects a strong finish to this calendar year with record-high deals in both residential and office transactions. "This growth is firmly anchored by the premium category which saw a significant rise moving from 15% in H1 2018 to 34% in H1 2024…While we appreciate the rise in the premium sector, the corresponding decline in the lower price categories should be addressed to ensure that there is more inclusive growth of the market," said Gulam Zia, senior executive director, research, advisory, infrastructure and valuation at Knight Frank India.

He expects the sales momentum to stay robust for the rest of the year amid stable macro conditions with the Indian economy continuing to grow. Of the 183,401 residential units launched in the first half of this year, Mumbai led the market with 46,985 units, while Kolkata saw the biggest increase in percentage terms at 60%, followed by Pune at 32%.

The quarter-to-sell (QTS) level time needed to sell entire inventory in the eight markets declined to 5.9 quarters or 18 months from 9.5 quarters in the first half of 2021 underscoring improving fundamentals. The QTS level of the premium category depicted a healthier picture at 5.1 quarters, indicating that inventory is still not a concern.

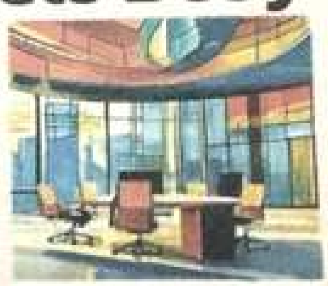
Mumbai saw the highest sales of 47,259 units, a 16% on-year growth. Kolkata clocked the highest home sales growth in percentage terms at 25%, followed by Ahmedabad at 17%. Residential units priced over ₹1 crore comprised 41% of total sales. Sales in this segment have surged 51%, becoming the primary driver for overall sales growth during the period. The sales share of residential properties priced at ₹50 lakh and below fell to 27% from 32% a year ago.

Rising property prices, higher home loan rates, and the pandemic's disproportionate impact have dampened demand in this category. This contrasts sharply with the 54% sales share seen in the first half of 2018.

ET GRAPHICS

Indian Office Space Market Gets Busy

In the second quarter (April-June) of calendar year 2024, the Indian office market exhibited varied demands from occupiers across nine major cities, resulting in a **total absorption of 18 million square feet**, a **27% jump** compared to the year-ago period. Each market displayed unique absorption trends, with the IT/ITES segment showing a strong resurgence, according to a CBRE report. Text: Our Bureau



CITY-WIDE ABSORPTION TRENDS

BENGALURU	MUMBAI	HYDERABAD	DELHI-NCR	CHENNAI	PUNE
55% share taken up by global capability centres (GCCs), followed by life and science cos	Broader sectoral demand seen, flexible operator leads	Research consulting and analytics (RCA) firms and life sciences cos lead	Diversified demand from tech, flex, and RCA firms	Tech firms lead quarterly space take-up	Strong demand from BFSI GCCs propels quarterly leasing to new highs
4 m sq ft	2.2 m sq ft	2.3 m sq ft	2.4 m sq ft	2.8 m sq ft	3.5 m sq ft

TOTAL ABSORPTION

~13.2 m sq ft

Development completions witnessed in Q2, up 49% Q-o-Q

CITIES LEADING THE ABSORPTION

- BENGALURU
- PUNE
- CHENNAI

Source: CBRE

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

Kailash.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 largest 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-Gramin (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 Baijal, CMD, Knight Frank India.

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

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