



Confederation of Indian Industry



INDIA INDUSTRIAL AUTOMATION SHOW 2017

Efficiency, Reliability and Accuracy

2nd-4th February 2017 at Pragati Maidan, New Delhi



2-4 February 2017
Pragati Maidan, New Delhi

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INDUSTRIAL AUTOMATION IN INDIA

In India, Industrial automation is gaining more importance on account of the rising efforts to make manufacturing processes more efficient and reduce defect rates. Automation systems with advanced features are being deployed in all the major sectors such as automotive, chemicals, manufacturing, and mining, etc., to perform a number of complex tasks and consistently provide customers with superior quality products. The installation of advanced communication networks is also facilitating in optimizing workflow in production facilities.

THE INDIAN ADVANTAGE

The industrial Automation market comprises of Process Automation, Factory Automation & Electrical Automation.

- Process Automation generally caters to continuous process industries, refineries, fertilizers, chemicals & petrochemicals, steel, cement, pulp & paper, polyester fibers, oil & gas exploration, production & distribution. Approximately the market size presently is around Rs. 8000 crores. There could be another Rs. 2000 crores worth direct import by specific projects/ OEMs.
- In Factory Automation generally, for discrete application there is a very little of Indian production practically imported but Indian subsidiaries of overseas companies do integration, supply & service Rs. 2000 crores as sensors & with PLC add another Rs. 2000 crores.
- In Electrical Automation, Transmission & Distribution, SCADA Systems & electrical parameters measuring add yet another Rs. 1500 crores.

Growth rate is stagnant over the last few years. If GDP grows at an average 7.6% per annum year on year, growth in instrumentation & automation could be around 4% from second year onwards. Again investments for smart cities & the Industry 4.0 (Industrial IOT) can raise this growth rate to around 7%.



OPPORTUNITIES

The opportunities in automation sector in India across various verticals are growing multifold. Increasing population, present lower per capita consumption and increasing purchasing power is driving the demand upwards. Whereas on one hand, the opportunities are on account of additional capacities being put in place to meet growing demand. On the other hand, the level of automation, which is relatively low in India as compared to global standards, itself is being redefined upwards. Over all, the environment is encouraging for automation industry in India.

GROWTH DRIVERS

- The economic growth in India is amongst the highest in the world, helped by a reorientation of government spending toward needed public infrastructure.
- Recognising the lying potential in the domestic as well as global market, the government of India has also taken initiatives to put a target for enhancing the manufacturing sector's contribution to 25 per cent of the GDP by 2025.
- Going beyond conventional use, today, the trend is to integrate manufacturing processes with IT by way of MES (Manufacturing Execution System) and PLM (Product Lifecycle Management), so that the efficiency improvement is extended beyond manufacturing process to the complete value chain of the organization.
- As labour is becoming more expensive, factory automation is also gaining ground. Manufacturers recognise the need to automate their processes, and now robotics is coming into use in appreciable way.
- In future, the pressure on efficiency (and production costs) will go up, forcing the manufactures to implement highly efficient processes. 'Transparency' of production processes to ensure 'tracing and tracking' of the products manufactured will also be a necessary requirement. Regulatory, safety and environmental demands will become more stringent and adherence to them will be mandatory.



- In energy sector having recognised more than 35 per cent of energy produced is not accounted for (AT&C losses), emphasis is being given for the electrical automation, transmission, and distribution by way of implementing SCADA, and smart grid.

- Electricity generation in the country during the current year registered a growth of 4.4 per cent, it said adding, a total of 3030 MW of grid-connected power generation capacity from renewable energy sources like solar and wind has been added so far this fiscal, taking the cumulative generation capacity in the country to over 38,820 MW.

POLICY MATTERS

Efforts are on to create a very conducive & incentivized ecosystem for R&D, also bring policy changes wherein indigenously developed instrumentation/automation products get overriding priority for usage in India. Further, indigenously developed products need to get certified by Indian Laboratories & certification bodies only for usage in India. Today many users ask for certification from overseas bodies. This requirement should be eliminated. There are some more policy changes required which are common with all process plant equipment.

EXHIBITOR PROFILE

- Industrial Automation (Production and Process Automation)
- Assembly & handling systems, Linear positioning systems
- Control systems, PCL, SCADA
- Industrial Pcs
- Embedded systems
- Industrial automatic data capturing and identification systems
- Automation services
- Industrial image processing systems
- Sensors and actuators
- Communication, networks and field bus systems
- Measuring and test systems
- Laser technology
- Compressed air generation and application
- Passive Components
- Electrical Systems
- Transformers, accumulators and uninterruptible power supplies
- Gears, mechanical drive systems
- Pumps and Valves
- Hydraulics and Pneumatics
- Electric switchgear and equipment for electrical control systems
- Electric and electronic test and measuring equipment
- Electric motors & frequency inverters, motor drives
- Cables & cabling accessories
- Electronic and opto-electronic components
- Robotics
- Industrial robots
- Robot simulation & vision system
- Service robots
- Machinery, appliances & components for robotics
- Industrial Automation IT & Software
- Manufacturing software
- Basic systems and development tools for industry
- Safety and Security Systems
- Internet, Intranet, Extranet solutions
- IT hardware for industry
- Production software
- Compressed-air and vacuum technology industry
- Services

VISITOR PROFILE - INDUSTRY WISE

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|----------------------------|--------------------------------------|--|--|
| • Engineering | • Paper and Plastic | • Food Processing | • Consultants |
| • Railways | • Power Generation | • Oil & Gas | • Fertilizer |
| • Civil Aviation, Airports | • IT & Ites | • Glass Industry | • Dyes |
| • Atomic Energy | • Steel | • Rubber Industry | • Defence |
| • Chemical | • Refrigeration and air conditioning | • Printing and Packaging | • Space |
| • Mining | • Textile | • Energy (Wind, Thermal, Hydro, Nuclear and Solar) | • Research and Development Organizations |
| • Cement | • Ceramic | • White Goods | • Technical Education |
| • Automobile | • Dairy | • OEMs | |
| • Pharmaceuticals | | | |



Confederation of Indian Industry

The Confederation of Indian Industry (CII) works to create and sustain an environment conducive to the development of India, partnering industry, Government, and civil society, through advisory and consultative processes.

CII is a non-government, not-for-profit, industry-led and industry-managed organization, playing a proactive role in India's development process. Founded in 1895, India's premier business association has over 8000 members, from the private as well as public sectors, including SMEs and MNCs, and an indirect membership of over 200,000 enterprises from around 240 national and regional sectoral industry bodies.

CII charts change by working closely with Government on policy issues, interfacing with thought leaders, and enhancing efficiency, competitiveness and business opportunities for industry through a range of specialized services and strategic global linkages. It also provides a platform for consensus-building and networking on key issues.

Extending its agenda beyond business, CII assists industry to identify and execute corporate citizenship programmes. Partnerships with civil society organizations carry forward corporate initiatives for integrated and inclusive development across diverse domains including affirmative action, healthcare, education, livelihood, diversity management, skill development, empowerment of women, and water, to name a few.

The CII theme for 2016-17, **Building National Competitiveness**, emphasizes Industry's role in partnering Government to accelerate competitiveness across sectors, with sustained global competitiveness as the goal. The focus is on six key enablers: Human Development; Corporate Integrity and Good Citizenship; Ease of Doing Business; Innovation and Technical Capability; Sustainability; and Integration with the World.

With 66 offices, including 9 Centres of Excellence, in India, and 9 overseas offices in Australia, Bahrain, China, Egypt, France, Germany, Singapore, UK, and USA, as well as institutional partnerships with 320 counterpart organizations in 106 countries, CII serves as a reference point for Indian industry and the international business community.



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