

NOW AVAILABLE

CONSTRUCTION IN INDIA 2012

Table of Contents

1. Executive Summary

SECTION I: MACRO VIEW OF CONSTRUCTION INDUSTRY

2. Overview

- Introduction
- Size and Growth
- Demand from Infrastructure
- Trends in Ancillary Markets (Material and Equipment)
- Key Concerns
- Future Outlook
- Conclusion

3. Key Recent Developments

- Introduction
- Policy Initiatives
- Project Completion and Awards
- Key Financings
- Performance of Construction Industry Players
- Conclusion

4. Contracting Industry Overview

- Introduction
- Market Structure
- Existing Capacity and Growth
- Order Inflows
- Analysis of Costs and Margins
- Key Players
- Issues and Concerns
- Outlook

5. Financing Needs and Investment Opportunities

- Introduction
- Investment Requirements
- Experience So Far
- Historical and Expected Rates of Returns
- Opportunities for Financial Investors
- Key Concerns
- Conclusion

6. Construction Risks and Project Execution

- Introduction
- Key Construction Risks
- Time and Cost Overruns – Central Sector Projects
- Time and Cost Overruns – State Sector Case Studies
- Key Recommendations

7. Market Trends of Materials (Cement and Steel)

- Introduction
- Cement
 - Size and Growth
 - Price and Cost Analysis
 - Market Structure
 - Key Players
 - Issues and Concerns
 - Outlook
- Steel
 - Size and Growth
 - Price and Cost Analysis
 - Market Structure
 - Key Players
 - Issues and Concerns
 - Outlook

8. Equipment Industry Trends

- Introduction
- Size and Growth
- Market Structure
- Trends in Production and Sales
- Equipment Financing, Leasing and Rental Market
- Key Players
- Issues and Concerns
- Outlook

9. Manpower Needs and Availability

- Introduction
- Current Scenario
- Future Manpower Requirements
- Wage Trends
- Issues and Concerns
- Future Road Map
- Conclusion

10. Experience of Foreign Construction Firms

- Introduction
- Overall Experience
- Key Players
- Issues and Concerns
- Key Learnings
- Future Outlook

SECTION II: DEMAND FROM INFRASTRUCTURE

11. Demand from Road Sector

- Introduction
- Capacity Addition Trends
- Upcoming Projects
- Construction Opportunities and Projections
- Future Outlook

12. Demand from Port Sector

- Introduction
- Capacity Addition Trends
- Upcoming Projects
- Construction Opportunities and Projections
- Future Outlook

13. Demand from Power Sector

- Introduction
- Capacity Addition Trends
- Upcoming Projects
- Construction Opportunities and Projections
- Future Outlook

14. Demand from Airport Sector

- Introduction
- Capacity Addition Trends
- Upcoming Projects
- Construction Opportunities and Projections
- Future Outlook

15. Demand from Water Supply and Irrigation Sectors

- Introduction
- Capacity Addition Trends
- Upcoming Projects
- Construction Opportunities and Projections
- Future Outlook

16. Demand from Urban Transport Sector

- Introduction
- Capacity Addition Trends
- Upcoming Projects
- Construction Opportunities and Projections
- Future Outlook

17. Appendix

Release Date: 22 October, 2012 No. of pages: 295

About Us

India Infrastructure Research is a division of **India Infrastructure Publishing Private Limited**, a company dedicated to providing information on the infrastructure sectors through magazines, conferences, newsletters and research reports. It publishes five magazines – **Indian Infrastructure**, **Renewable Watch**, **Power Line**, **tele.net** and **Gujarat Infrastructure**.

India Infrastructure Research publishes research reports in the areas of power, oil & gas, ports & shipping, roads & bridges, telecommunications, aviation and water. Our reports are acknowledged as high-quality, user-friendly, up-to-date, accurate and comprehensive sources of information.

Our clients include most organisations involved in the infrastructure sectors – multinationals, top Indian corporates, commercial and investment banks, consulting companies, public sector companies, government agencies, multilateral agencies and legal firms.

List of Tables and Figures

LIST OF TABLES

Investment in Construction in the Twelfth Five Year Plan
Achievements of Key Infrastructure Sectors
High-Level Committee on Financing of Infrastructure
Projects Awarded in 2012-13
Capacity Addition in 2011-12
Addition in Installed Capacity during April to August 2012
Addition in Installed Capacity during 2010-11 and 2011-12
Thermal Capacity Generation Target/Achievement during 2011-12
Metro Stretches Completed in 2011-12
Financial Results of Diversified Construction Companies for First Quarter of 2012-13 (Rs million)
Order Book and Revenue of Diversified Construction Companies
Distribution of Contractors by Employment Size
Top 15 Construction Companies in terms of Market Cap
Revenue of Top 15 Listed Construction Companies in 2011-12
Revenue of Top 12 Unlisted Construction Companies in 2011-12
Order Books of Top 15 Construction Companies in 2011-12
Plant and Machinery Value of Top 15 Construction Companies in 2011-12 (Rs billion)
Project Award in the Road and Port Sectors
No. of Employees in Select Construction Companies
Key Players in the Indian Construction Industry
Twelfth Plan Construction Investment Requirement
Gross Bank Credit Outstanding to the Construction Industry
Exposure of Banks to Construction Industry and Infrastructure Sector as of March 2012 (Rs billion)
Exposure of Banks to Steel and Cement Industries as of March 2012 (Rs billion)
Investment Opportunities offered to Financial Investors
Unlisted Construction Companies' PAT (Rs million)
Cost Overrun in Infrastructure Sectors (Rs billion)
List of a Few Delayed State Road Projects
List of a Few Delayed State Power Projects
List of a Few Delayed State Port Projects
List of a Few Delayed Urban Transport Projects
List of a Few Delayed State-level Water Supply Projects
Cement Production by Leading Players (mt)
Cement Production by Key Players in Q1 2012-13 (mt)
Region-wise Cement Production Growth (mt)
Variety-wise Cement Production (mt)
Region-wise Cement Consumption (mt)
Capacity Additions of Cement Industry (mtpa)
Capacity Addition of Some Leading Cement Players (mt)
Region-wise Average Price of Cement (Rs/50 kg bag)
Physical Performance of Some Leading Cement Players
Key Financials of Some Leading Cement Players
Key Projects of Some Leading Cement Players (2011-12)
First Quarter Production of Some Key Steel Players (mt)
Imports of Finished Steel (mt)
Capacity and Production of Steel Companies in India
Global Equipment Sales by Region (\$ million)
Production and Sales of Construction Equipment in India
Equipment-wise Sales in India (units)
Equipment-wise Sales in India (\$ million)
Disbursements of SEFPL (Rs billion)
Indicative List of Products Offered by Key Manufacturers
Capacity Expansion Plans of Key Equipment Manufacturers
Forecast Sales of Construction Equipment in India (units)
Forecast Sales of Construction Equipment in India
Current Employment Break-up for Construction Industry
Range of Minimum Wages (Rs/day)

Details of Prominent Foreign Contractors in India
Physical Progress of Non-NHDP National Highways during the Eleventh Five Year Plan
State Road Network in Key States (2011) (km)
Progress under PMGSY between 2007-08 and 2011-12
Balance Length for Award under NHDP
Yet to be Awarded Mega Highway Projects
Construction Opportunities in SARDP-NE
Key State Road Projects Offering Construction Opportunities in the Next 1-2 Years
Construction Opportunity in the Twelfth Five Year Plan for National Highways
National Highways Projects Offering Immediate Construction Opportunities
Upcoming Bridge/Flyover/Expressway Projects
Cargo Traffic Handled at Indian Ports between 2007-08 and 2011-12
Major Port Project Heads in the Twelfth Five-Year Plan
Upcoming Projects in Major Ports
Major Port Projects Awarded and Offering Construction Opportunity in 1-2 Years (as of August 2012)
Greenfield Ports Likely to Come Up for Construction in 2-3 Years
Construction Opportunities in the Major Ports
Construction Opportunities in the Non-major Ports
Segment-wise Growth in the Power Sector
Fuel-wise Growth in Installed Power Generation Capacity
Growth in Installed Capacity of Grid Interactive Power from Renewable Sources (MW)
Growth in Transmission Line Infrastructure (ct. km)
Growth in Transmission Substation Infrastructure
Growth in Distribution Line Infrastructure (ct. km)
Tentative Generation Capacity Addition in the Twelfth Plan
List of Private Inter-state Transmission Projects Identified for Competitive Bidding
Estimated Market Size for BoP Services during the Twelfth Plan
Construction Opportunity in the Conventional Power Segment
Traffic and Aircraft Movement at Domestic and International Airports in the Eleventh Plan Period
Expected Investment in Airports during Twelfth Plan Period
Expected Investment in Metro Airports during Twelfth Plan Period (Rs billion)
Future Construction Opportunities at Metro Airports
Status of Greenfield Airports Granted 'In-Principle' Approval
Construction Opportunities at Non-metro Airports
Twelfth Plan Investment Requirements in the Urban Water and Wastewater Segment (Rs billion)
Key Upcoming Projects under JNNURM UIG
Key Upcoming Big-ticket Water Projects
Twelfth Plan Investment Requirements in Major and Medium Irrigation Works (Rs billion)
Completed Metro Projects (as of August 2012)
Metro Projects Under Construction
Metro Projects Offering Construction Opportunity in the Next 2-3 Years
Monorail Projects Offering Construction Opportunity in the Next 2-3 Years
Construction Opportunity in the Urban Transport Sector

LIST OF FIGURES

Construction as a per cent of GDP
Quarter-on-Quarter Growth Rates for the Construction Industry
Growth in GDP at Factor Cost and Construction Industry
Construction Opportunities by Infrastructure Sectors in the Near term
Growth in Equipment Sales (%)
Trends in Cement Production and Consumption (mt)

Cement Exports and their Share in Production
Wholesale Price Index of Cement (base year=2004-05)
Trends in Steel Production and Consumption (mt)
Wholesale Price Index of Steel (base year=2004-05)
Sector-wise Number of Projects Facing Delays
Phase-wise Breakup of Projects Awarded during April 2011-April 2012 (km)
Revenue of Listed Construction Companies (Rs billion)
Order Books of Construction Companies (Rs billion)
Plant and Machinery Value of Construction Companies
Trend of Median Proportion of Employee Costs (%)
Trend of Median Proportion of Interest Costs (%)
Trend of Median Proportion of Raw Material Costs (%)
Median Profit Margins for Construction Companies (%)
Fund Raising by Construction Companies in the Capital Markets
Fund Raising by Construction Companies through Private Equity
Distribution of Companies on the Basis of Profitability Ratios
Reasons Cited by Developers for Delay in Infrastructure Projects
Reasons Cited by Contractors for Delays in Infrastructure Projects
Time Overrun in Delayed Central Sector Infrastructure Projects
Sector-wise Number of Projects Facing Delays
Trends in Cement Production (mt)
Trends in Cement Consumption (mt)
Cumulative Capacity of Cement Industry (mtpa)
Trend in Capacity Utilisation over the Eleventh Plan (%)
Index Numbers of Wholesale Prices of Cement
Trend in Steel Production (mt)
Consumption Trend of Finished Steel (mt)
Steel Industry Cumulative Capacity (mtpa)
Capacity Utilisation of Steel Industry (%)
Movement in Wholesale Price Index of Steel (2004-05=100)
Movement in International Prices of Steel (\$ per tonne)
Projected Manpower Requirements in the Twelfth Plan
Projected Shortage of Professionals in 2022
Manpower Initiatives Planned by Key Sectors
Growth of GDP at Factor Cost and of Construction Industry
Participation of Foreign Contractors in the NHDP
Sector-wise Participation of Foreign Contractors in India
Issues faced by Foreign Contractors in Project Execution
Indian Road Network
Year-wise Length Completed under NHDP (km)
Port Capacity between 2006-07 and 2011-12 (mtpa)
Cargo Traffic at Major Ports between April-August 2012
Cargo Composition at Major Ports
Cargo Composition at Non-major Ports
Capacity Addition in the Maritime States in the Twelfth Five-Year Plan
Investment in Construction Activities in Major Ports in the Twelfth Plan
Investment in Construction Activities in the Non-major Ports in the Twelfth Plan
Traffic and Aircraft Movement at Domestic and International Airports in First Quarter of 2012-13
Status of Upcoming Greenfield Airports
Households Dependence on Tap Water (per cent)
Households Dependence on Wells (per cent)
Households Dependence on Handpumps and Tubewells
Capacity Addition to Metro Projects between 2007-08 and 2011-12
Construction of Elevated versus Underground Structures in Metro Projects

I would like to purchase the “Construction in India 2012” report:

Format (PDF)	Price	Service tax (12.36%)	Total
Site Licence (Single Location)	Rs 45,000	Rs 5,562	<input type="checkbox"/> Rs 50,562
Enterprise Licence (Multiple Locations)	Rs 67,500	Rs 8,343	<input type="checkbox"/> Rs 75,843

I am enclosing a cheque/demand draft for Rs. _____, vide cheque/demand draft no. _____ drawn on _____ dated _____ in favour of “India Infrastructure Publishing Pvt. Ltd.”

Signature

.....

Name (Block Letters) _____

Designation _____

Company _____

Mailing Address _____

Telephone _____ Mobile _____

Fax _____

E-mail _____

Wire transfer details:

Beneficiary : India Infrastructure Publishing Pvt. Ltd.
Bank Name : The Royal Bank of Scotland N.V.
Bank Address : M-6, Hauz Khas, New Delhi 110016, India
Account No. : 1050338
Swift Code : ABNAINBBDEL
IFSC Code : ABNA0100327

Contact details:

Upasna Tyagi
 Information Products
 India Infrastructure Publishing Pvt. Ltd.
 B-17, Qutab Institutional Area, New Delhi - 110 016, India
 Tel: +91 11 46012963, 41034600, 41034601
 Fax: +91 11 2653 1196 Mobile: +91 9582852125
 upasna.tyagi@indiainfrastructure.com