

# Construction in India 2021-22

Opportunities, Projections and Post-Covid Outlook

- ❖ Research Report
- ❖ Data-set (Excel)

## The Construction in India 2021-22 will help you:

- ❖ Analyse the key trends and recent developments
- ❖ Highlight the construction opportunities across nine infrastructure and housing sectors in 2021-22
- ❖ Gauge the impact of Covid on project delivery, contractors and financing
- ❖ Support business planning and strategies in a post Covid scenario
- ❖ Track the progress of announced, under bidding and ongoing projects
- ❖ Evaluate the market opportunities for contractors, technology & equipment providers and material suppliers

The construction sector faces burgeoning demand in line with the launch of the ambitious National Infrastructure Pipeline (NIP) and the government's aim to make India a \$5 trillion economy by 2024. A total capital investment of over \$680 billion has been planned during 2020-25 across construction-intensive sectors such as roads, railways, airports, metro rail and irrigation under the NIP. The road sector offers huge opportunities under the Bharatmala programme with a completion target of 35,000 km by 2024-25. Indian Railways (IR) too has a planned capital investment of over \$185 billion by 2024-25. IR plans to complete over 17,000 km of new lines, and doubling and gauge conversion works by 2023-24. The upcoming dedicated freight corridors and highspeed rail corridors also highlight substantial opportunities. In the metro rail segment, a capital investment target of almost \$80 billion till 2025 has been set. The NIP has also identified airport projects worth \$20 billion, highlighting plenty of opportunities. While project execution has improved over the years, the heightened level of activity in the construction sector has highlighted the need for more efficient contracting practices, adoption of new and innovative materials, and deployment of cost-effective construction techniques and state-of-the-art equipment.

## Executive Summary

### SECTION I: TRENDS, IMPACT OF COVID-19, PROJECT PIPELINE AND UPCOMING OPPORTUNITIES

#### 1. Market Overview

- ❖ Size and Growth
- ❖ Demand from Infrastructure and Housing
- ❖ Recent Trends
- ❖ Evolving Contracting Practices
- ❖ New Construction Practices and Techniques
- ❖ Key Government Initiatives and Recent Policy Changes
- ❖ Union Budget 2021 Announcements for the Construction Industry
- ❖ Investment Requirements under National Infrastructure Pipeline
- ❖ Issues and Challenges
- ❖ Outlook and Opportunities (till 2025-26)

#### 2. Impact of Covid-19 on Projects and Contractors

- ❖ Impact on Projects
  - Pace of Construction
  - Expected Time Overruns (Short Term and Medium Term)
    - Ongoing/Under Construction Projects
    - Under Bidding Projects
    - New Project Announcements
  - Raw Material and Equipment Availability
  - Input Costs
  - Labour Supply
- ❖ Impact on Contractors
  - Order Books
  - Capex Plans
  - Stressed Assets
  - Financial Performance
  - Contract Renegotiations and Dispute Resolution

#### 3. Project Pipeline Analysis

- ❖ Assessment of Project Pipeline:
  - Short Term (2021-22)
  - Medium Term
  - Long Term
- ❖ Analysis by Sector
- ❖ Analysis by Stage of Development
- ❖ Analysis by Ownership
- ❖ Analysis by Region
- ❖ Analysis by Investment
- ❖ Top Upcoming Projects in Terms of Construction Opportunity in 2021-22
- ❖ Projects Awaiting Clearances/Land Acquisition/Financial Closure

#### 4. Future Outlook and Market Opportunities (2021-22 and Beyond)

- ❖ Growth Drivers
- ❖ Sector-wise Upcoming Construction Opportunities
  - Size of Investment
  - Expected Capacity
- ❖ Equipment Demand Projections
- ❖ Material Demand Projections
- ❖ Market Opportunities For:
  - Contractors
  - Equipment Providers
  - Consultants
  - Financiers and Investors
  - Technology Providers
- ❖ Post Covid-Outlook

#### 5. Financing Needs and Challenges

- ❖ Financing Scenario
- ❖ Emerging Funding Sources
- ❖ Working Capital Requirements

- ❖ Current Stance of Investors and Lenders
- ❖ Stressed Assets and M&A Opportunities
- ❖ Financing Needs and Requirements
- ❖ Key Risks and Challenges

- ❖ Recent Project Awards and Completions
- ❖ Expected Investments and Capacity Addition (Greenfield and Brownfield)
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
- ❖ Post-Covid Construction Outlook

## SECTION II: CONSTRUCTION DEMAND FROM KEY SECTORS - OPPORTUNITIES AND KEY PROJECTIONS

### 6. Roads

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Recent Project Awards and Completions
- ❖ Expected Investments and Capacity Addition (Highway Widening, State Roads, Bridges, Flyovers, Elevated Roads and Expressways)
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
- ❖ Post-Covid Construction Outlook

### 7. Railways

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Recent Project Awards and Completions
- ❖ Expected Investments and Capacity Addition (New Lines, Stations, Doubling, Track Construction, etc.)
- ❖ Focus on DFCs: Future Corridors and Opportunities
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
- ❖ Post-Covid Construction Outlook

### 8. Airports

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction

### 9. Urban Transport

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Expected Investments and Capacity Addition (Metro Rail, Monorail, Light Rail, BRTSI)
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
- ❖ Post-Covid Construction Outlook

### 10. Ports

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Recent Project Awards and Completions
- ❖ Expected Investments and Capacity Addition
- ❖ Construction Opportunities in 2021-22
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### 11. Power

- ❖ Sector Snapshot
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- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Expected Investments and Capacity Addition
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
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**12. Water and Waste**

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Expected Investments and Capacity Addition
- ❖ Construction Opportunities in 2021-22
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**13. Irrigation**

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Expected Investments and Capacity Addition
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**14. Tunnels**

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Expected Investments and Capacity Addition
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
- ❖ Post-Covid Construction Outlook

**15. Housing**

- ❖ Sector Snapshot
- ❖ Overall Construction Progress
- ❖ Key Trends
- ❖ Major Players
- ❖ New Initiatives to Fastrack Construction
- ❖ Expected Investments and Capacity Addition

- ❖ Opportunities under Affordable Housing
- ❖ Construction Opportunities in 2021-22
- ❖ Issues and Challenges
- ❖ Post-Covid Construction Outlook

**SECTION III: EQUIPMENT AND MATERIAL MARKET: TRENDS AND DEMAND PROJECTIONS (2021-22 to 2025-26)****16. Equipment**

- ❖ Market Size and Trends
- ❖ Production and Sales
- ❖ Emerging Equipment Requirements
- ❖ Rental and Leasing Market
- ❖ Major Players
- ❖ New Products and Innovations
- ❖ Growth Drivers
- ❖ Demand Forecasts for 2021-22
- ❖ Demand Forecasts Beyond 2021-22

**17. Materials: Cement, Steel, Bitumen and Others\***

- ❖ Market Size and Production Trends
- ❖ Demand-Supply Scenario
- ❖ Existing Capacity and Utilisation
- ❖ Pricing Trends
- ❖ Projected Capacity Addition
- ❖ Emerging and New Requirements
- ❖ Growth Drivers
- ❖ Supply Forecasts (2021-22 and Long Term)
- ❖ Demand Forecasts (2021-22 and Long Term)

*\*Other Materials will include geosynthetics, aggregates, fly ash, coir geotextiles, and plastic waste*

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