



सत्यमेव जयते

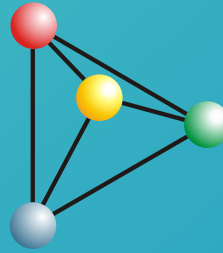
Department of Chemicals and Petrochemicals
Government of India



8th

BIENNIAL INTERNATIONAL CONFERENCE & EXHIBITION

INDIA CHEM 2014



International Conference on

- Chemicals • Petrochemicals • Technologies, Process, Plant Machinery, Control & Automation Systems



Theme: Spurting the Growth of Indian Chemical & Petrochemical Industry

Oct 9, 2014- Hotel Lalit, Mumbai

Oct 10-11, 2014 - Bombay Exhibition Centre
Mumbai



Knowledge Partner & Strategy Consultant



TATA STRATEGIC MANAGEMENT GROUP

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*The road ahead is as long as you make it.
Make it worth the trip.*

- Jon Bon Jovi



OVERVIEW

The chemical industry is a capital as well as knowledge intensive industry. The industry plays a significant role in global economic and social development. It is also a human resource intensive industry and generates significant employment. Globally, the industry employs more than 20 million people. The global chemical industry was estimated at USD 3.9 trillion in 2013 and is expected to grow at 4-5% CAGR to reach USD 5.2-5.5 trillion by 2020.

“Over the last few decades, the chemical industry has seen an increasing shift towards Asia. This is in line with shift of key consumer industries (e.g. Automotive, Electrical and Electronics) towards Asia. The share of Asia in global chemical industry has increased from 31% in 1999 to 52% in 2013 while the share of Europe and North America has decreased from over the same period.”

The Indian Chemical Industry

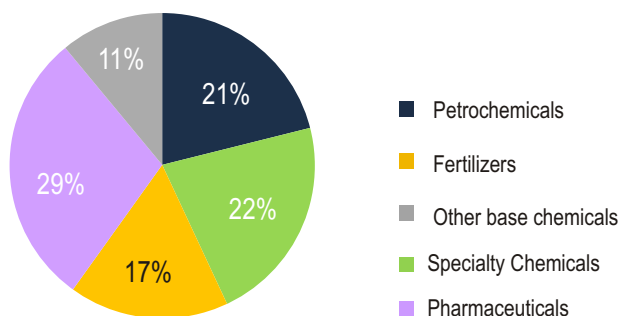
The Indian chemical industry is a critical part of the Indian economy. The industry contributed approximately 6% to the country's GDP and accounted for ~13% of the total Indian exports in 2013. With more than 80,000 products for downstream industries like automotive, textiles, pharmaceuticals, personal care, consumer durables, construction & engineering, food production and processing, the Indian chemical industry is playing a critical role in enhancing the quality of life.

The Indian chemical industry stood at INR 819,000 Cr. (USD 140 Bn) in 2013 which accounts for ~3% of the global chemical industry. Increasing urbanization and percapita disposable income is resulting in a strong growth outlook for several key end use industries. This will positively impact the growth in Indian chemical industry. FICCI & TATA Strategic expects the Chemical Industry to grow at 8-9% CAGR over next decade and is expected to reach INR 1,180,000 - 1,300,000 Cr. (USD 200-220 Bn) by 2020 accounting for 4-5% of global chemical market.

The chemical industry can be mainly classified into four key segments:

- 1. Chemicals:** It includes Basic Organic Chemicals (methanol, acetic acid etc), basic inorganic chemicals (Caustic soda, chlor alkali etc) along with the speciality chemicals. The key sub-segments within this are Agrochemicals, Fine Chemicals, Dyes-colorants/pigments and personal care chemicals. The Sp. Chem. sector has grown at a CAGR of 12.5% over the last five years to reach INR 154,400 Cr (USD 26.4 billion) in 2013
- 2. Petrochemicals:** Petrochemicals cover basic chemicals like Ethylene, Propylene, Benzene and Xylene, intermediates like MEG, Acrylonitrile, LAB etc., synthetic fibers like Nylon, PSF and PFY and polymers like LDPE/HDPE, PVC, Polyester and PET etc. Over the last five years the sector has grown at

India chemical Industry, 2012





~8% CAGR to reach INR 147,400 Cr.(USD 25.1 billion) in 2013. The Indian Govt. has followed a cluster approach and has approved four PCPIRs (Petroleum, Chemical and Petrochemical Investment Region) to enhance the competitiveness of domestic manufactures which are under various stages of development. So far INR 54,000 Cr (~USD 9 billion) has been invested for PCPIR development.

3. Fertilizers: It includes all types of N, P& K based fertilizers like Urea, DAP etc. The Indian fertilizer consumption stands at ~144 kg/ha which is higher

than the global average of ~122 kg/ha. The industry has grown at a rate of ~4.5% CAGR over the last five years to reach INR 119,300 Cr. (USD 20.4 billion) in 2013.

4. Pharmaceuticals: The Indian pharmaceutical industry is ranked 3rd in the world in terms of production volume and 13th in terms of domestic consumption value. The industry consists of APIs and formulations. Over the last five years the industry has grown at ~15% to reach INR 203,500 Cr. (USD 34.8 billion) in 2013.

The Indian Chemicals industry comprises of small and large scale units. A number of multi-national companies have invested in the Indian Chemical sector. From April 2000 to March 2013, the sector has

received a cumulative FDI of USD 8.9 billion which has helped in keeping its growth momentum going. In Chemical sector, 100 percent Foreign Direct Investment (FDI) is permissible and manufacturing of most chemical products including organic/in-organic, dyestuffs and pesticides is de-licensed.

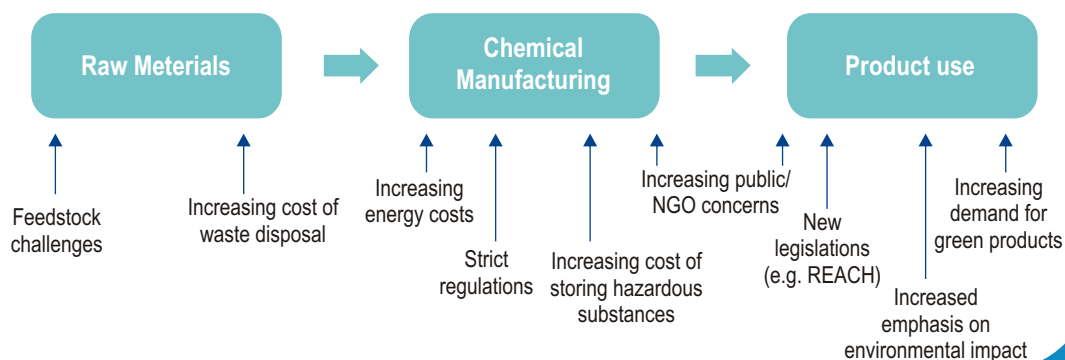
With Asia's increasing influence as a key consumption region, India emerges as one of the focus destinations for chemical companies worldwide. In order to encourage domestic manufacturing, Govt. of India has set the target of increasing the share of manufacturing in GDP from 16% to 25% by 2025 which is likely to create enhanced opportunities for the Chemical sector in coming years

Green Chemistry and Sustainability in Chemical Sector

While there are opportunities for growth, the Indian Chemical Industry will need to overcome a number of critical challenges to remain competitive at a global scale. Feedstock availability is a key challenge faced by the Chemical Industry. Shale gas dynamics are playing a crucial role. Furthermore, petrochemical feedstocks face challenges in terms of price volatility, supply constraints, and political uncertainties in several feedstock rich nations.

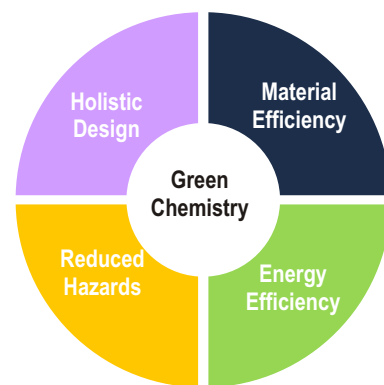
The Indian Chemical industry is also facing challenge in controlling its energy and water footprint. New

legislations like (REACH) are creating pressure for chemical industry to meet regulatory challenges and complying with them significantly adds to the overall manufacturing costs. Such a situation calls for industry and Govt. to work together to establish norms which creates a balance between industry growth and impact on environment. Simultaneously, companies need to relook at their manufacturing processes and develop products which are relatively easier to comply with national and international norms.



Essentially, the present chemistry can be classified as challenging wherein majority of raw materials used are from non-renewable sources and products are manufactured using multi-step and energy intensive processes. Through implementation of green practices companies can improve mass and energy efficiency, resulting in reduced hazardous wastes generation. Companies will also gain by having lower material costs, significantly reduced environmental impacts, hence creating an improved image across stakeholders. All this would result in a sustained growth for the Chemical sector.

Green Chemistry Metrics



The Prospects are bright and so are the challenges.

There is huge unrealized potential of growth of chemical industry as indicated by the present very low per capita consumption levels in the country. Per capita consumption of agrochemicals is only 0.60 kgs/hectare and similarly per capita plastics consumption in the country is still hovering about 8 kgs, while the world average is above 40 kgs. The key growth driver is the rapidly increasing domestic demand being driven by approx. 250 million Indian

middle class consumers who need more high-quality end products and the chemical industry has to facilitate same. The opportunity created has to overcome challenges such as the Feedstock unavailability, Infrastructure bottlenecks, Developing successful clusters, Skills gap and Trade Agreements and regulatory concerns. These issues will be debated by a galaxy of experts in the forthcoming conference.



About the Event

FICCI jointly with the Dept of Chemicals & Petrochemicals, Govt. of India and with the support of various industry associations is organising an International Conference at "India Chem 2014" on Oct 9-11, 2014 at NSE Complex, Goregaon, Mumbai. The theme of the event being "Spurting the Growth of Indian Chemical Industry. A Handbook covering all aspects of Indian Chemical sector is being prepared jointly with Tata Strategic Management Group and will be released at the Conference.

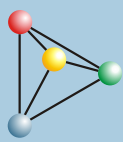
Event Objectives

- ❖ To discuss and debate the opportunities and challenges for the Indian Chemical sector in the emerging global scenario.
- ❖ To provide a unique platform to interact and network with industry and policy makers, in an effort to identify the various impediments to the growth and functioning of the industry as well as to forge strategic partnership.
- ❖ To highlight the business opportunities in the industry & invite global investors to invest in these upcoming sectors in the country.
- ❖ To bridge the gap between Indian & Global companies by exploring the possibilities of mergers, joint ventures, co manufacturing and strategic alliances.
- ❖ To discuss and deliberate on the feedstock, R&D, infrastructure, environmental concerns as also the emerging technologies enhancing the productivity and competitiveness.



8th BIENNIAL INTERNATIONAL
CONFERENCE

INDIA
CHEM
2014



October 9 - 11, 2014
Bombay Exhibition Centre, Mumbai, India

REGISTRATION FORM

Name: Designation:

Name: Designation:

Organization:

Address:

..... Pin:

Telephone(s): Fax:

Email: Mob:

Email: Mob:

Cheque/DD Number: Dated:

Bank Details: Amount:

Please note:

Registration Fee Structure:

Indian Nationals : INR 5000/- per person
Foreign Nationals : USD 120/- per person
(includes Indian residing abroad and foreigner residing in India)

Incentives

For 2 or more delegates, FICCI Associate members and members of the supporting associations- 10% disc: Rs 4500
For 5 or more delegates and FICCI Corporate members- 25% disc : Rs 3750

For Academics/Students INR 1000 per person (restricted to 20 academicians/students each sponsored by the institution/industry)

Please note:

- All fees are payable by cash/cheque/DD in favour of "FICCI" payable at New Delhi.
- The delegate fee includes conference kits, study material, lunches and dinner. It does not include airfare, hotel stay or any other incidental expenses.
- You may also pay through Swift transfer in favour of "Bank Name: United Bank of India, Tansen Marg, New Delhi -110001 ; Savings A/c No. '0359018009732; SWIFT Code: UTBIINBBTNM; IFSC Code: UTBI0TNM709*"
- You are requested to kindly mention name of the event while making the payment.

Refund Policy: request received in writing upto September 20, 2014 will be considered for cancellation. A 25 percent handling charge will be deducted from the total amount deposited towards the delegate fee and the rest refunded by cheque. No amount will be refunded after September 20, 2014.

Kindly send duly filled in registration form to:

Mr P. S. Singh

Head
Chemicals & Petrochemicals Division
FICCI

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New Delhi-110001

Tel: +91-11-23487473 (Dir)
EPBX: +91-11-23738760-70 (Extn 473)
Email: Prabhsharan.singh@ficci.com

www.indiachem.in



Premier Partner: INR 9 Lacs

- Display of Company logo as "Premier Partner" at the side panel of conference backdrop.
- Exclusively for one partner
- Separate branding standy's for the premier partner at the conference and lunch venue
- Screening of partner's promotional film during Tea Breaks
- Full page advertisement in the booklet of the event
- Reserved table for the delegates in the hall
- Eight complimentary delegate passes for the conference
- An exclusive display/table space at the conference venue for display of their material.
- Corporate Literature (1 CD and 8-10 pages brochure) to be included in the delegate kit.

Platinum Partner: INR 7 Lacs

- Display of Company logo as "Platinum Partner" at the side panel of conference backdrop.
- Screening of partner's promotional film during the Lunch breaks
- Full page advertisement in the booklet of the event
- Reserved table for the delegates in the hall
- Seven complimentary delegate passes for the conference
- An exclusive display/table space at the conference venue for display of their material.
- Corporate Literature (1 CD and 8-10 pages brochure) to be included in the delegate kit.

Gold Partner: INR 5 Lacs

- Display of Company logo as "Gold Partner" at the side panel of conference backdrop.
- Six complimentary delegate passes for the conference
- Full page advertisement in the booklet of the event
- An exclusive display/table space at the conference venue for display of their material.
- Corporate Literature (1 CD and 8-10 pages brochure) to be included in the delegate kit

Silver Partner: INR 4 Lacs

- Display of Company logo as "Silver Partner" at the side panel of conference backdrop.
- Five complimentary delegate passes for the conference
- Full page advertisement in the booklet of the event
- Corporate Literature (1 CD and 8-10 pages brochure) to be included in the delegate kit.

Lunch Partner: 2 Lacs

- Special Panel acknowledging "Lunch Partner" at lunch venue.
- Three complimentary delegate passes for the conference

Delegate Kit Partner: 3 Lacs

- Display of company logo at the back panel of conference backdrop
- Name and logo of the partnering company to embossed on the delegate kit.
- Three complimentary delegate passes for the conference.
- Full page advertisement in the booklet of the event

Associate Partner: 2 Lacs

- Display of company logo as an "Associate Partner" at side panel of the conference Backdrop.
- Two complimentary delegate passes.
- Full page advertisement in the booklet of the event

In addition all partners are entitled to

- Display of partner's logo on the event website and all conference material
- Special announcement for thanking partner.

Advertisement for conference booklet...

Category	Amount	Category	Amount
Full Page	Rs 20000/-	Inside Back cover	Rs 30000/-
Back Cover	Rs 40000/-	Inside Front cover	Rs 40000/-

*All fees is exclusive of service tax (Service tax 12.36%)



Who Should participate?

Policy Makers/ Academics/ Researchers/ Chief Executive Officers/ Chief Information Officers/ Marketing Professionals/ Head- R&D/ Regulatory Affairs and Quality Managers/ Directors-Corporate Strategy/ Consultants/ Contact Research Organisations/ Contract Manufacturers and others with interest in fast emerging opportunities in Indian chemical sector.

Issues to be Covered:

- Panel Discussion on the theme of the conference
- Feedstocks options
- Infrastructure
- Regulatory Environment incl. ease of doing business.
- Skilling of human resources
- Logistics and Supply Chain Challenges
- Global Developments

Participation Details

Delegate Fees	Category	Amount
(includes attending all conference sessions, exhibitions, lunches, dinner & delegate kits)	Indian National:	INR 5000 per delegate
	Foreign Nationals:	USD 120 per delegate
Incentives:		Refund Policy
<ul style="list-style-type: none"> • FICCI members: INR 5000/- per person • For 2 or more delegates from the same Co; FICCI Associate members and members of supporting associations (10% disc): INR 4500/- per person • For 5 or more delegates from the same Co; FICCI Corporate members (25% disc) : INR 3750/- per person • For Academics/Students INR 1000 per person (restricted to 20 academicians/students each sponsored by the institution/industry) 		Requests for refund received before Sep 20, 2014 will only be considered . A 25% handling charge shall be deducted from the amount deposited towards the delegate fee.

Branding Opportunities

"India Chem 2014" provides an ideal platform to enhance your company image and create brand awareness for your products and services among existing and new customers through the following branding opportunities.

• Premier Partner:	INR 9 Lacs *	• Platinum Partner:	INR 7 Lacs
• Gold Partner:	INR 5 Lacs	• Silver Partner:	INR 4 Lacs
• Networking Lunch Partner : (for each day)	INR 2 Lacs	• Kit Partner:	INR 3 Lacs*
• Associate Partner:	INR 2 Lacs		

**Exclusively to one partner*



Department of Chemicals & Petro-Chemicals
Government of India

The Department of Chemicals & Petro-Chemicals has been part of the Ministry of Chemicals and Fertilizers, Government of India from 5.7.1991. The Department is entrusted with the responsibility of policy, planning, development and regulation of Chemicals and Petrochemicals Industries.

For more details on Department of Chemicals & Petro-Chemicals; please log on to www.chemicals.nic.in



Industry's Voice for Policy Change

Established in 1927, FICCI is the largest and oldest apex business organisation in India. Its history is closely interwoven with India's struggle for independence, its industrialization, and its emergence as one of the most rapidly growing global economies. FICCI has contributed to this historical process by encouraging debate, articulating the private sector's views and influencing policy.

A non-government, not-for-profit organisation, FICCI is the voice of India's business and industry.

FICCI draws its membership from the corporate sector, both private and public, including SMEs and MNCs; FICCI enjoys an indirect membership of over 2,50,000 companies from various regional chambers of commerce.

For more information, please log on to www.ficci.com

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Organisation of Pharmaceutical Producers of India



Indian Drug Manufacturers' Association



Indian Speciality Chemical Manufacturers' Association



Pesticides Manufacturers & Formulators Association of India



Indian Pharmaceutical Alliance



The Plastics Export Promotion Council



Indian Chemical Council



The Chemical & Alkali Merchants' Association



The Dyestuffs Manufacturers' Association of India

For further details, please contact...

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