



# FCP TIMES

A MONTHLY NEWS LETTER FOR FLUID  
CONVEYANCE PRODUCTS INDUSTRY



## India's Heavy Earthmoving Equipment Industry: Growth, Transformation, and Future Opportunities

India's economic momentum is deeply rooted in its infrastructure expansion, industrialization, and urbanization. At the core of this growth lies the Heavy Earthmoving Equipment (HEMM) industry — the mechanical backbone of projects that shape the nation's landscape. From highways, metros, and airports to mines, ports, and renewable energy projects, these machines move the earth that builds the future.

The HEE segment, comprising excavators, backhoe loaders, wheel loaders, bulldozers, graders, dump trucks, and compactors, forms a crucial subset of India's construction and mining equipment (CME) industry. The sector is witnessing a period of rapid evolution driven by new technologies, government policies, infrastructure funding, and a growing preference for mechanization across sectors.

Industry experts estimate that India's construction equipment market, valued at over USD 7–8 billion in FY2024, is poised to grow at a compound annual growth rate (CAGR) of 8–10% over the next five years. Within this, the earthmoving equipment category contributes nearly 70% of the total market — underscoring its strategic dominance.



### Evolution and Current Market Landscape

India's HEMM journey started modestly in the 1960s with limited domestic manufacturing. Over time, collaborations between Indian companies and global giants transformed the ecosystem. Companies like BEML, L&T, and Tata-Hitachi pioneered large-scale production, while JCB, Caterpillar, Hyundai and Komatsu expanded their footprints through local assembly plants.

#### Market Segmentation

- Earthmoving Equipment (~70%)  
Excavators, backhoe loaders, wheel loaders, and bulldozers dominate this category.
- Material Handling Equipment (~15%)  
Cranes, forklifts, and telehandlers.
- Concrete and Road Construction Equipment (~15%)  
Pavers, compactors, batching plants, and graders.

Among all, backhoe loaders remain the most popular segment, accounting for nearly 40–45% of total sales volume due to their versatility and affordability, especially for small and medium contractors.

#### Key Industry Players

- Indian OEMs: BEML, L&T Construction Equipment, ACE, Escorts Kubota, Tata-Hitachi
- Global Entrants with Local Manufacturing: JCB India, Caterpillar India, Volvo CE, Komatsu, Hyundai, SANY, Doosan, and Kobelco.
- Component Manufacturers: Companies in hydraulics, hose assemblies, powertrains, and fabrication — such as Imperial Auto, Hydrolines, Hytech, Micron Specma, Wipro, Danfoss, Parker, Gates, Fluiconnecto, Dantal Hydraulics etc. form the vital supply chain backbone.

### Demand Drivers and Industry Catalysts

The HEMM industry's growth trajectory is directly

proportional to India's infrastructure ambition. Several macro and microeconomic forces are propelling sustained demand:

#### Infrastructure Development

Government initiatives such as Bharatmala, Sagarmala, PM Gati Shakti, and the National Infrastructure Pipeline (NIP), with a planned investment of over USD 1.4 trillion, are driving massive demand for earthmoving and construction equipment. Road construction alone consumes nearly 40% of HEMM demand, especially for excavators, compactors, and graders.

#### Urbanization and Smart Cities

With over 400 million urban residents and rising, India's cities are expanding rapidly. Metro rail projects, smart city missions, and affordable housing programs (PMAY-U) are fueling sustained equipment utilization across multiple urban clusters.

#### Mining and Natural Resources

The government's renewed focus on coal, iron ore, and mineral exploration, coupled with an emerging interest in critical minerals (lithium, rare earths, copper), has triggered a revival in mining equipment demand. Large mining operators are upgrading fleets for productivity, safety, and emissions compliance.

#### Power, Water, and Renewable Projects

Hydroelectric dams, irrigation canals, and solar or wind energy installations require earthmoving for site grading, foundation work, and access road development. The upcoming hydropower and pumped-storage projects are new frontiers for specialized earthmoving fleets.

### Market Trends and Technological Transformation

#### Digitization and Telematics

Almost every leading OEM now integrates telematics systems for real-time tracking, fuel monitoring, and predictive maintenance. Systems like JCB LiveLink and CAT Product Link allow contractors to manage fleets efficiently, reducing downtime and fuel wastage.

#### Electrification and Sustainability

While diesel remains dominant, hybrid and electric prototypes are being tested, especially for compact machines. Future opportunities include:

- Battery-electric mini excavators and wheel loaders.
- Hydrogen fuel cell systems for large mining applications.
- Retrofit electrification kits for urban sites with emission restrictions.

#### Equipment-as-a-Service (EaaS)

A significant shift is underway from ownership to usage. Rental and leasing models now represent almost 25–30% of total machine deployment, particularly among small contractors. Organized rental companies with fleet maintenance and financing capabilities are expanding rapidly.

#### Localization and Component Manufacturing

India's localization levels have improved drastically, with many OEMs sourcing over 70% of components domestically. This has created parallel opportunities for hydraulic systems, hose assemblies, castings, forgings, and fabricated structures. The government's Atmanirbhar Bharat initiative further incentivizes component indigenization.

### Challenges and Bottlenecks

Despite the growth story, several challenges persist:

1. Cyclical Demand: Dependence on government projects means industry cycles fluctuate with public spending.
2. Skill Shortage: Operator and technician training remains a gap, affecting productivity and safety.
3. Financing Constraints: Smaller contractors face difficulty in securing affordable loans for equipment purchase.
4. Environmental Regulations: Upgrading to new emission

norms increases costs for OEMs and customers alike.

5. Aftermarket Fragmentation: Many regional players offer non-genuine parts, affecting machine reliability and lifecycle costs.

### Emerging Business and Investment Opportunities

#### Equipment Rental and Fleet Management

With cost-conscious contractors and seasonal projects, rental models are becoming the preferred choice. There is huge potential in building digital platforms for equipment rental aggregation, combining GPS tracking, usage-based billing, and operator deployment.

#### Aftermarket and Service Ecosystem

The aftermarket revenue—spare parts, maintenance, refurbishing, and telematics-based service contracts—is projected to grow faster than new equipment sales. Organized service providers and digital parts marketplaces will dominate this space.

#### Component Manufacturing and Local Supply Chain

Investing in hydraulic fittings, hose assemblies, cylinders, filters, and fabrication units can yield long-term stability, given OEMs' increasing emphasis on domestic sourcing and cost competitiveness.

#### Electrification and Green Equipment

Startups and R&D-focused firms working on battery integration, charging solutions, and hybrid drive systems for smaller construction machines will see early adoption in urban and confined-site applications.

#### Training and Skill Development

Institutions like Mahayaan Global and others are pioneering vocational programs for operators and service engineers. Partnerships between OEMs and training centres can fill the industry's skill gap and boost employability.

#### Used Equipment and Resale Platforms

India's secondary market for used machines is valued at nearly USD 3 billion, yet remains largely unorganized. Developing transparent, certified resale networks offers a scalable business opportunity.

#### Telematics and Predictive Analytics

AI-powered data analytics for fleet optimization, preventive maintenance, and machine health prediction will be a critical value differentiator for both OEMs and rental companies.

### The Road Ahead: 2025–2035 Vision

The next decade promises to be transformative for the Indian earthmoving sector. Some defining trends for the future include:

1. Integration of IoT, AI, and Automation — autonomous haulage systems and semi-autonomous operation for safety and precision.
2. Electrification & Green Shift — increased focus on sustainability, renewable-powered worksites, and emission-free equipment.
3. Industry Consolidation — mergers and acquisitions among rental firms and component manufacturers for scale and efficiency.
4. Export Opportunities — India as a global manufacturing hub for affordable, mid-range earthmoving machines targeting Africa, Southeast Asia, and the Middle East.
5. Circular Economy Practices — remanufacturing, recycling, and life-extension programs for components and machines.

By 2030, India is expected to be among the top three global markets for construction and earthmoving equipment, alongside China and the United States. The emphasis will shift from volume-based growth to value-based growth, where productivity, sustainability, and digital integration define competitiveness.

# Online Business Opportunity in Hydraulic Components Sector in India

India's industrial landscape is witnessing rapid evolution with the surge of digital transformation and the government's focus on manufacturing, infrastructure, and construction development. Among the many sectors benefiting from this growth, the hydraulic components industry stands out as a critical enabler for heavy machinery, mining, agriculture, and manufacturing applications. Traditionally dominated by offline distribution networks, the hydraulic sector is now at the cusp of a major online transformation, offering a compelling business opportunity for entrepreneurs and established players alike.



## Market Overview

The Indian hydraulics market — encompassing pumps, hoses, fittings, cylinders, valves, and filters — is projected to reach over US\$3.1 billion by 2033, growing at a CAGR of 5.7%. This growth is driven by increased demand from construction, infrastructure, agriculture, and mining sectors, all of which rely heavily on hydraulic systems for efficient operation. Parallely, the aftermarket demand for replacement and maintenance components is surging. Equipment owners and service providers increasingly prefer quick, transparent, and reliable online sourcing of parts. The convenience of digital access, coupled with faster logistics, has opened doors for specialized online platforms to fill a long-standing gap in the industry.

## Why Online? The Digital Advantage

The hydraulic components business has traditionally depended on physical dealerships, distributors, and local service points. However, with digitization and growing comfort with online B2B transactions, several advantages have emerged:

- **Wider Market Reach:** Online platforms can serve customers across India — from large OEMs to small workshops in remote areas.
- **24x7 Availability:** Customers can browse, compare, and

order components anytime, increasing convenience and sales potential.

- **Reduced Middlemen:** Direct connection between manufacturers and end users leads to better pricing and faster delivery.
- **Technical Clarity:** Online catalogues can provide detailed specifications, CAD drawings, and compatibility charts, reducing errors.
- **Data Insights:** Digital platforms collect valuable data on demand trends, helping optimize inventory and marketing efforts.

In essence, digital transformation can bridge the gap between industrial buyers and component suppliers — something the hydraulic industry has long needed.

## Segments Offering Strong Online Potential

1. **Hydraulic Hoses and Fittings**
  - High-frequency replacement items used in earthmoving, construction, and agricultural machinery.
  - Scope for both standard and customized fittings — a niche where design expertise adds great value.
2. **Hydraulic Pumps and Cylinders**
  - Growing demand from infrastructure, manufacturing, and renewable energy projects.
  - Aftermarket and reconditioning segments offer recurring business opportunities.
3. **Hydraulic Seal Kits and Lube Filters**
  - A rapidly expanding segment, projected to grow at over 8% CAGR, driven by the need for equipment reliability and longer life.
4. **Smart Hydraulic Components**
  - Integration of sensors, pressure indicators, and IoT-enabled systems for predictive maintenance — an emerging area for future growth.

## Emerging Business Models

1. **Online Direct Sales Platform (E-Commerce Model)**  
Develop an online store offering standard hydraulic components such as hoses, fittings, and filters. This model suits businesses with their own production or strong distributor relationships.
2. **Online Marketplace Model**  
A digital marketplace aggregating multiple component manufacturers and suppliers. The platform earns through commissions, subscriptions, and logistics services — becoming a one-stop destination for all hydraulic needs.
3. **Custom Design & Supply Portal**  
Combine design expertise with online quotation and order management. Customers upload drawings or specifications, and the platform delivers customized hydraulic fittings or assemblies. This model perfectly complements initiatives like Design and Drawing Centres for Hydraulic Fittings.

## Key Steps to Build a Successful Online Hydraulic Business

1. **Select the Right Product Focus**  
Start with high-demand items such as hoses, fittings, or filter elements before expanding into larger assemblies.
2. **Create a Comprehensive Online Catalogue**  
Include part numbers, specifications, machine compatibility, and high-quality images. Ensure simple search and filtering options.
3. **Ensure Quality and Certification**  
Industrial buyers trust quality. Provide ISO/BIS certifications, test reports, and warranty support to build credibility.
4. **Integrate Efficient Logistics**  
Partner with logistics providers to ensure timely delivery across India. Maintain regional warehouses in industrial hubs like Pune, Chennai, and Faridabad.
5. **Add Value Through Knowledge**  
Publish technical blogs, training videos, and product selection guides. Educating customers enhances trust and organic reach.
6. **Digital Marketing & Lead Generation**  
Use SEO, LinkedIn campaigns, and Google Ads to target workshops, contractors, and maintenance engineers. Participate in industry exhibitions to promote your online platform.

## Future Outlook

India's focus on infrastructure, "Make in India," and industrial automation will ensure sustained demand for hydraulic systems. The digitalization of the hydraulic supply chain is still in its early stages, presenting a once-in-a-decade opportunity for first movers.

With government-backed initiatives such as Digital India and MSME modernization schemes, small and mid-sized enterprises can adopt digital commerce models at lower cost and scale faster. As more industries embrace online procurement, the hydraulic components sector will witness the emergence of specialized e-commerce platforms — much like how the auto spare parts and electrical sectors evolved in the past decade.

The hydraulic components sector in India is on the verge of a digital revolution. The convergence of industrial growth, online buying behaviour, and manufacturing capability creates a fertile ground for entrepreneurs to build scalable, profitable online ventures.

Whether it's a dedicated e-commerce store, a multi-vendor marketplace, or a custom design and supply portal, the time is right to step into the digital domain. Companies with technical expertise, strong supplier networks, and a customer-first mindset will not only succeed but redefine how India sources hydraulic components in the future.

## ACE to Invest Rs 4 Bn in New Construction Crane Facility at Palwal, Haryana

Action Construction Equipment (ACE), India's leading construction equipment and crane manufacturer, has announced an investment of Rs 4 billion to set up a new construction crane manufacturing facility at Palwal, Faridabad, Haryana. Spanning 22 acres, the facility is aimed at meeting the growing demand in the construction sector and strengthening ACE's manufacturing footprint. Alongside this expansion, ACE has also acquired 32 acres of land in Indore for future projects aligning with its long-term growth strategy.



Sorabh Agarwal, Executive Director, ACE, said, "Our focused strategy to double revenues by FY 2030 is backed by decisive moves into high-potential segments such as backhoe loaders, defence, and agriculture, along with a concerted push to double our export footprint." He added that infrastructure investments like the Palwal plant, capacity augmentation, and next-gen technology adoption are enhancing ACE's competitiveness. The company also reported its highest-ever revenue and profits in Q4/FY25, underlining its strong growth trajectory.

## HD Hyundai Launches Smart X Plus Excavators and BS-V Wheel Loaders in India

HD Hyundai Construction Equipment India unveiled its all-new 20-ton Smart X Plus excavator series along with the BS-V Wheel Loader models at its manufacturing facility in Chakan, Pune. The launch featured five upgraded 20-ton excavator models—R210, R215, R215L, R230LM, and R245LR—designed to perform across diverse terrains for construction, mining, irrigation, and infrastructure projects. The BS-V Wheel Loader series includes the 3-ton HL630I and 5-ton HL650I models, engineered for high productivity, fuel efficiency, and durability in material handling applications across mining quarrying, ports, and construction sites. Compliant with government-mandated BS-V emission norms, both machines combine robust build quality with advanced technology, ensuring reliability while lowering operating costs. The event was attended by authorized dealers, customers, media partners, and key stakeholders.

"Combining superior-quality products with advanced

automation will make Hyundai the preferred choice for customers in construction, infrastructure, port, mining, and quarry sectors "said Cheolgon Choi, Global CEO of HD Hyundai CE.



## CCI clears Allison Transmission's Rs 16k-cr acquisition of Dana's off-highway unit

The Competition Commission of India (CCI) has cleared the acquisition of Dana Incorporated's off-highway business (Dana OH) by Allison Transmission Holdings, Inc. The proposed deal involves Allison, a global player in vehicle propulsion systems, transmissions and electrified powertrains, taking over Dana's off-highway division. While Allison's core expertise lies in propulsion solutions for commercial on-highway vehicles, a small part of its product line is used in off-highway applications such as construction, mining, agriculture, and forestry. Headquartered in Indianapolis, USA, Allison operates across more than 150 countries and has a wholly owned subsidiary in India—Allison Transmission India Private Limited.

Dana OH, on the other hand, is a global manufacturer of drivetrain, transmissions and propulsion systems catering to multiple industries. It operates in over 25 countries and has three subsidiaries in India—Graziano Transmission India, Dana India, and Dana India Technical Centre—covered under the transaction.

According to CCI, the approval paves the way for enhanced competition and technology infusion in India's construction, mining and off-highway equipment sectors. The detailed order from the Commission will be issued separately.

## Wheels India inks SHPAC tech deal to boost global hydraulic cylinder growth

Chennai-based Wheels India has signed a technical technology transfer agreement with SHPAC, a leading hydraulics cylinder manufacturer in South Korea, to boost the company's business in the segment.



WHEELS INDIA LIMITED

*"It has been our stated intent to focus and grow the hydraulics cylinder business significantly over the next few years. We believe this business segment has potential to be an important growth driver for Wheels India globally, going forward," said Srivats Ram, managing director, Wheels India.*

SHPAC is a leading manufacturer of hydraulic cylinders in South Korea with a successful track record over the last few decades, exporting their products worldwide.

Ram said that the company, which is a leading manufacturer of wheels for the global construction equipment industry, has been expanding its presence in Europe and North America.

*"We expect to leverage the technology transfer by accessing existing customers and will continue to invest in the hydraulic cylinder business as opportunities arise," he added.*

Last year, the company crossed the milestone of Rs 100 crore in net profit. For the first quarter ended June 30, Wheels India registered a net profit of Rs 26.44 crore on revenues of Rs 1,187 crore, with export revenues crossing the Rs 300-crore mark.

## Kerala's First Underwater Tunnel Project Worth Rs. 2,672 Crore

Kerala is preparing to build its first underwater tunnel between Vypin and Fort Kochi. The tunnel will be a landmark project under the state's coastal highway initiative. Once complete, the tunnel will reduce the 16 km journey to 3 km, saving time and improving Kochi's coastal connectivity.

The underwater tunnel project will cost around Rs. 2,672 Crore and will have two separate tubes. Each tube will be 2.75 km long, including 1.75 km of bored tunnel and 1 km of cut-and-cover section. Moreover, each tunnel will have an outer diameter of 12.5 metres and an inner width of 11.25 metres.

The structure will run about 35 metres below sea level. It will follow global safety standards with emergency lay-bys every 250 metres, escape routes every 500 metres, and a modern ventilation system. These features will make travel both safe and comfortable for commuters.

Currently, people traveling between Fort Kochi and Ernakulam depend on busy ferry routes or long detours through the Goshree Bridge. The new underwater tunnel will change that completely. It is expected to reduce travel time by nearly two hours.

## Cheap Chinese Steel Imports Threaten India's Domestic Industry, Says Steel Secretary Sandeep Poundrik

India's steel industry is facing mounting pressure as a surge in low-cost imports, particularly from China, continues to flood the domestic market. Steel Ministry Secretary Sandeep Poundrik has sounded the alarm, revealing that around 150 mills have shut down and another 50 have cut production, as prices fall to their lowest level in nearly five years.

Poundrik said the influx of cheap Chinese steel has created a major challenge for Indian producers, especially small and medium-sized mills, which contribute nearly half of the country's total steel output. Even large players such as JSW Steel Ltd. are feeling the impact, with profit margins narrowing due to the sharp decline in domestic steel prices.

Despite the strong demand for steel driven by India's massive infrastructure push and robust economic growth, local manufacturers are struggling to stay competitive against imported steel priced significantly lower. "Price is a problem when we need to invest in 100 million tons of capacity," Poundrik noted, emphasizing that such expansion would require nearly \$100 billion in investment, which could become unviable if price pressures persist.

The government has already imposed a 12% safeguard duty on a wide range of steel products to counter the influx of cheap imports.



## Excon – 2025 to be take place from Dec 9th to Dec 13th in Bengaluru Industry, Says Steel Secretary Sandeep Poundrik

Excon is a prominent trade fair for the construction industry in South Asia. Held every two years in Bangalore, India, Excon provides a platform for construction equipment manufacturers, component suppliers, and service providers to showcase their products and services.



The event is organized by the Confederation of Indian Industry (CII) and is scheduled to be held between 9 – 13 December 2025 at BIEC, Bengaluru. It is expected to attract visitors from all over the world as well as from neighbouring countries. Excon is an ideal platform for business networking, identifying new business opportunities, and keeping abreast of the latest trends and technologies in the construction industry.

Excon covers a wide range of products and services related to the construction industry, including earthmoving

equipment, material handling equipment, construction vehicles, construction tools and accessories, building materials, and much more. The event also features conferences, seminars, and panel discussions that provide valuable insights into the industry's current and future trends.

Excon has grown in size and stature over the years and is now recognized as one of the largest construction equipment trade fairs in South Asia. The event has become a must-attend event for all construction industry stakeholders, including manufacturers, suppliers, dealers, contractors, and end-users.

In conclusion, Excon is a significant event for the construction industry in South Asia, providing a platform for stakeholders to showcase their products and services, network with industry peers, and gain valuable insights into the latest industry trends and technologies.

## BPCL and OIL Ink Agreement to Develop ₹1 Lakh Crore Ramayapatnam Greenfield Refinery

Bharat Petroleum Corporation Limited (BPCL) has signed a non-binding agreement with Oil India Limited (OIL) to explore collaboration in setting up BPCL's upcoming Greenfield Refinery and Petrochemical Complex near Ramayapatnam Port in Andhra Pradesh's Nellore district.



The planned facility, estimated at ₹1 lakh crore, will have a refining capacity of 9–12 million metric tonnes per annum (MMTPA). It will include a 1.5 MMTPA ethylene cracker unit, the first of its kind in southern India, with a petrochemical intensity of 35 percent. The Ramayapatnam complex is expected to commence commercial operations by FY 2030.

## India launches third round of PLI Scheme for specialty steel to boost investments

The government has launched the third phase of its production-linked incentive (PLI) scheme for specialty steel, aiming to attract investments in advanced steel products and reduce import reliance in critical sectors like defence, automotive, and space.

The scheme, which will begin offering incentives from FY 2026-27, focuses on products such as super alloys, stainless steel, CRGO, and coated steels. With a revised base year for pricing (FY 2024-25), the initiative is expected to foster domestic production and employment. So far, the PLI scheme has attracted Rs 43,874 crore in investment, generating employment of over 30,000.

The third round will cover 22 product sub-categories and offer incentives ranging from four percent to 15 percent based on incremental sales, benefiting companies in strategic and commercial steel grades.

## Rashmi group to set up steel plant in West Bengal

Kolkata-based Rashmi group would set up a 2.8 million tonne per annum (MTPA) integrated steel plant along with a 400 Mw captive power plant in Purulia district, West Bengal. The proposed investment in the project is about 10,000 crore and the target is to complete the project by 2030. In a statement, the company said that the state government has allotted 938 acres of land for the project and awarded it with an "ultra-mega project" status, which has enabled its expansion to receive fast-tracked approvals. The proposed expansion is part of a broader growth strategy of the group operating across iron and steel, cement, power, ferro alloys, and mining. "Our investments reflect not only confidence in the state's potential but also our shared commitment to making Bengal a leading economic powerhouse of the East," said L.B. Chourasia.



## Raipur-Visakhapatnam Expressway: A Six-Lane Marvel Driving India's Next Growth Corridor

The Raipur-Visakhapatnam expressway, spanning 464 km, is set to connect Chhattisgarh, Odisha, and Andhra Pradesh, creating a crucial economic and logistic link between central and coastal India. Once operational, it will drastically reduce travel time and distance between Raipur and Vizag, enabling faster movement of goods and people.

The expressway will also integrate remote and tribal regions into the mainstream economy, fostering balanced regional growth. Improved inter-state connectivity is expected to enhance accessibility to ports, industrial clusters, and tourist destinations, positioning this route as a major national transport corridor.

Approved under Bharatmala Pariyojna Phase I, The Raipur - Vizag expressway is part of India's most ambitious infrastructure mission. It adds to boost trade efficiency and logistics through modern expressways linking industrial and mineral rich regions.

**COMMODITY INDEX**

| Months | Alloy Steel - Forging (20 MnCr5) Rs/Tonne | Alloy Steel - Forging (EN8) Rs/Tonne | Nickel US \$/Tonne | Zinc US \$/ Tonne | Synthetic Rubber SBR | EPDM-Rs. Per Kg | Carbon Black-Rs. Per Kg |
|--------|---|--------------------------------------|--------------------|-------------------|----------------------|-----------------|-------------------------|
| Oct-24 | 66000                                     | 65000                                | 16804              | 3102              | 188.25               | 225             | 116.12                  |
| Nov-24 | 66000                                     | 65000                                | 15740              | 2999.1            | 181                  | 225.15          | 113.86                  |
| Dec-24 | 65250                                     | 64250                                | 15443              | 3031.7            | 177.19               | 225.5           | 106.2                   |
| Jan-25 | 64000                                     | 63000                                | 15378              | 2825              | 178                  | 225.2           | 105.13                  |
| Feb-25 | 63000                                     | 62000                                | 15274              | 2799.7            | 183.12               | 225.5           | 109.95                  |
| Mar-25 | 63000                                     | 62000                                | 16054              | 2778.9            | 185.5                | 225.5           | 111.69                  |
| Apr-25 | 63250                                     | 62250                                | 15209              | 2625.3            | 186.57               | 225.5           | 101.07                  |
| May-25 | 64000                                     | 63000                                | 15324              | 2646.2            | 195.03               | 225.5           | 98.59                   |
| Jun-25 | 62250                                     | 61250                                | 14989              | 2650.9            | 187.88               | 225.5           | 108.59                  |
| Jul-25 |   | 61000                                | 15023.3            | 2758.8            | 184.18               | 220.45          | 113.05                  |
| Aug-25 |   | 61000                                | 14909              | 2784.4            | 174.33               | 219.12          | 105.68                  |
| Sep-25 | 61000                                     | 60500                                | 14708              | 2756              | 177.4                | 218.6           | 107.25                  |

**BACKHOE LOADERS SALES IN INDIA - 2025**

| Month | JCB   | Excorts | Mahindra | Case | Tata Hitachi | Bull Machines | Bobcat | CAT | Manitou | ACE | Total 2025 | Total 2024 |
|-------|-------|---------|----------|------|--------------|---------------|--------|-----|---------|-----|------------|------------|
| Jan   | 4215  | 32      | 78       | 153  | 136          | 227           | 98     | 93  | 27      | 99  | 5158       | 5148       |
| Feb   | 3594  | 13      | 66       | 147  | 118          | 192           | 96     | 85  | 18      | 70  | 4399       | 4270       |
| Mar   | 3302  | 66      | 74       | 182  | 176          | 100           | 105    | 110 | 30      | 90  | 4235       | 4916       |
| Apr   | 2615  | 10      | 75       | 114  | 42           | 80            | 55     | 65  | 15      | 65  | 3136       | 3170       |
| May   | 1880  | 20      | 56       | 129  | 73           | 140           | 86     | 89  | 25      | 67  | 2565       | 2844       |
| June  | 1626  | 24      | 65       | 149  | 89           | 95            | 68     | 63  | 21      | 50  | 2250       | 3005       |
| Jul   | 2105  | 5       | 38       | 113  | 91           | 116           | 77     | 75  | 35      | 73  | 2728       | 2451       |
| Aug   | 2665  | 18      | 45       | 140  | 99           | 116           | 64     | 80  | 25      | 74  | 3326       | 3198       |
| Sep   | 3672  | 14      | 87       | 183  | 126          | 167           | 68     | 92  | 84      | 76  | 4569       | 4475       |
| Total | 25674 | 202     | 584      | 1310 | 950          | 1233          | 717    | 752 | 280     | 664 | 32366      | 33477      |

**COMPACTORS SALES IN INDIA - 2025**

| Month | Case | HAMM | Dynapac | JCB | L & T | Excorts | Volvo | AMMAN | Others | Total 2025 | Total 2024 |
|-------|------|------|---------|-----|-------|---------|-------|-------|--------|------------|------------|
| Jan   | 109  | 134  | 57      | 60  | 26    | 23      | 28    | 37    | 5      | 479        | 410        |
| Feb   | 109  | 116  | 55      | 50  | 30    | 32      | 17    | 47    | 5      | 461        | 490        |
| Mar   | 166  | 97   | 51      | 60  | 43    | 24      | 40    | 40    | 14     | 535        | 699        |
| Apr   | 74   | 113  | 36      | 52  | 20    | 10      | 19    | 15    | 2      | 341        | 450        |
| May   | 69   | 51   | 41      | 36  | 17    | 12      | 9     | 15    | 4      | 254        | 324        |
| June  | 43   | 44   | 28      | 39  | 18    | 22      | 17    | 13    | 1      | 225        | 233        |
| Jul   | 28   | 29   | 15      | 12  | 12    | 0       | 6     | 1     | 1      | 104        | 187        |
| Aug   | 69   | 36   | 21      | 37  | 24    | 2       | 13    | 8     | 10     | 220        | 231        |
| Sep   | 76   | 81   | 32      | 84  | 28    | 2       | 21    | 11    | 3      | 338        | 454        |
| Total | 743  | 701  | 336     | 430 | 218   | 127     | 170   | 187   | 45     | 2957       | 3478       |

**EXCAVATORS SALES IN INDIA - 2025**

| Month | Tata Hitachi | JCB  | Hyundai | Sany | Kobelco | CAT  | Komatsu | Volvo | Liugong | XCMG | CNH | Total 2025 | Total 2024 |
|-------|--------------|------|---------|------|---------|------|---------|-------|---------|------|-----|------------|------------|
| Jan   | 654          | 575  | 622     | 460  | 199     | 125  | 178     | 113   | 204     | 206  | 7   | 3343       | 3123       |
| Feb   | 638          | 510  | 511     | 492  | 165     | 138  | 175     | 103   | 156     | 331  | 6   | 3225       | 2969       |
| Mar   | 823          | 549  | 578     | 533  | 212     | 184  | 245     | 120   | 197     | 320  | 14  | 3775       | 3478       |
| Apr   | 438          | 542  | 481     | 341  | 117     | 99   | 148     | 97    | 255     | 343  | 2   | 2863       | 2434       |
| May   | 460          | 403  | 417     | 312  | 120     | 131  | 111     | 99    | 139     | 315  | 4   | 2511       | 2226       |
| June  | 402          | 330  | 327     | 187  | 96      | 131  | 116     | 100   | 101     | 128  | 2   | 1920       | 2183       |
| Jul   | 400          | 357  | 256     | 172  | 133     | 110  | 91      | 62    | 48      | 119  | 2   | 1750       | 1992       |
| Aug   | 399          | 429  | 336     | 272  | 110     | 122  | 108     | 70    | 38      | 192  | 5   | 2081       | 2392       |
| Sep   | 590          | 512  | 471     | 310  | 140     | 136  | 149     | 137   | 60      | 175  | 9   | 2689       | 2499       |
| Total | 4804         | 4207 | 3999    | 3079 | 1292    | 1176 | 1321    | 901   | 1198    | 2129 | 51  | 24157      | 23296      |

**AUTOMOBILE SALES IN INDIA - 2025**

| Month | 2- Wheelers | 3- Wheelers | Personal Vehicles | Commercial Vehicles | 2025     | 2024     |
|-------|-------------|-------------|-------------------|---------------------|----------|----------|
| Jan   | 1525862     | 107033      | 465920            | 99425               | 2198240  | 2038982  |
| Feb   | 1353281     | 94181       | 303398            | 82763               | 1833623  | 1952915  |
| Mar   | 1508232     | 99376       | 350603            | 94764               | 2052975  | 2048731  |
| Apr   | 1686774     | 99766       | 349939            | 90558               | 2227037  | 2165828  |
| May   | 1652634     | 104448      | 302214            | 75615               | 2134911  | 2035090  |
| June  | 1446387     | 100625      | 297722            | 73367               | 1918101  | 1840307  |
| Jul   | 1355504     | 111426      | 328613            | 76439               | 1871982  | 1964213  |
| Aug   | 1373675     | 103105      | 323256            | 75592               | 1875628  | 1910312  |
| Sep   | 1287735     | 98866       | 299369            | 72124               | 1758094  | 1674183  |
| Total | 13190084    | 918826      | 3021034           | 740647              | 17870591 | 15956378 |

**TRACTORS SALES IN INDIA - 2025**

| Month | Mahindra Group | TAFE Group | Sonalika | Escorts Ltd | John Deere | New Holland | Captain | VST  | Others | 2025   | 2024   |
|-------|----------------|------------|----------|-------------|------------|-------------|---------|------|--------|--------|--------|
| Jan   | 26305          | 10709      | 8027     | 6058        | 6436       | 2905        | 240     | 259  | 936    | 61875  | 55589  |
| Feb   | 23880          | 9555       | 7670     | 7968        | 5771       | 2732        | 162     | 208  | 1219   | 59165  | 76626  |
| Mar   | 31916          | 11606      | 9262     | 8803        | 5931       | 3026        | 180     | 225  | 3052   | 74001  | 63753  |
| Apr   | 38516          | 14462      | 9955     | 8148        | 6856       | 3484        | 209     | 250  | 1947   | 83131  | 76939  |
| May   | 30154          | 11813      | 9620     | 8161        | 5924       | 3051        | 125     | 213  | 2134   | 71195  | 70063  |
| June  | 31804          | 14502      | 10136    | 8443        | 6212       | 3381        | 140     | 245  | 1716   | 76579  | 71047  |
| Jul   | 37335          | 15815      | 12536    | 9196        | 7027       | 3872        | 150     | 275  | 1947   | 88722  | 79961  |
| Aug   | 35574          | 16986      | 10410    | 8662        | 5987       | 3900        | 155     | 355  | 3186   | 85215  | 65477  |
| Sep   | 64946          | 27530      | 17971    | 17803       | 9240       | 6825        | 240     | 357  | 1268   | 146180 | 100542 |
| Total | 255484         | 105448     | 95587    | 83242       | 59384      | 33176       | 1601    | 2387 | 16137  | 599883 | 559455 |

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| Access to Fluid Conveyance Group (Dub)  | X           | X               | 1 Group        |
| Access to Fluid Conveyance Group (SAARC Countries)                                    | X           | X               | 1 Group        |
| Access to Monthly Newsletter FCP Times  | ✓           | ✓               | ✓              |
| Support on liquidation of slow-moving and dead inventory of Fluid Conveyance Products | ✓           | ✓               | ✓              |
| Searching Support on Fluid Conveyance products  | X           | ✓               | ✓              |
| Tender News (On Hoses, Hose Assemblies, Fittings etc.)                                | ✓           | ✓               | ✓              |
| Drafting & Implementing Job Route Cards   | X           | X               | ✓              |
| Plant Layout with process flow excellence   | X           | X               | ✓              |
| Drafting / Implementing SOP / Work Instructions / Safety Plans / Process Flow         | X           | X               | ✓              |
| Training - Fittings Threads Identification  | X           | X               | 2 Days         |
| Training - PC of Making Hose Assemblies   | X           | X               | 1 Day          |
| Hose/Hose assembly/Hose Fittings Failure analysis support.                            | X           | X               | ✓              |
| Assistance on GEM Portal registration   | X           | X               | ✓              |
| Inventory Management Systems  | X           | ✓               | ✓              |
| Ask the experts (FCP Team)  | X           | X               | ✓              |
| Festival Promotional Banners  | 5           | 5               | 10             |
| Ceasing and Updating LinkedIn Page  | X           | X               | ✓              |
| Job Reference Support   | X           | X               | ✓              |
| Classified ad in FCP Times  | X           | X               | 3              |
| Company Profile Presentation (PPT)  | X           | X               | 1              |

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