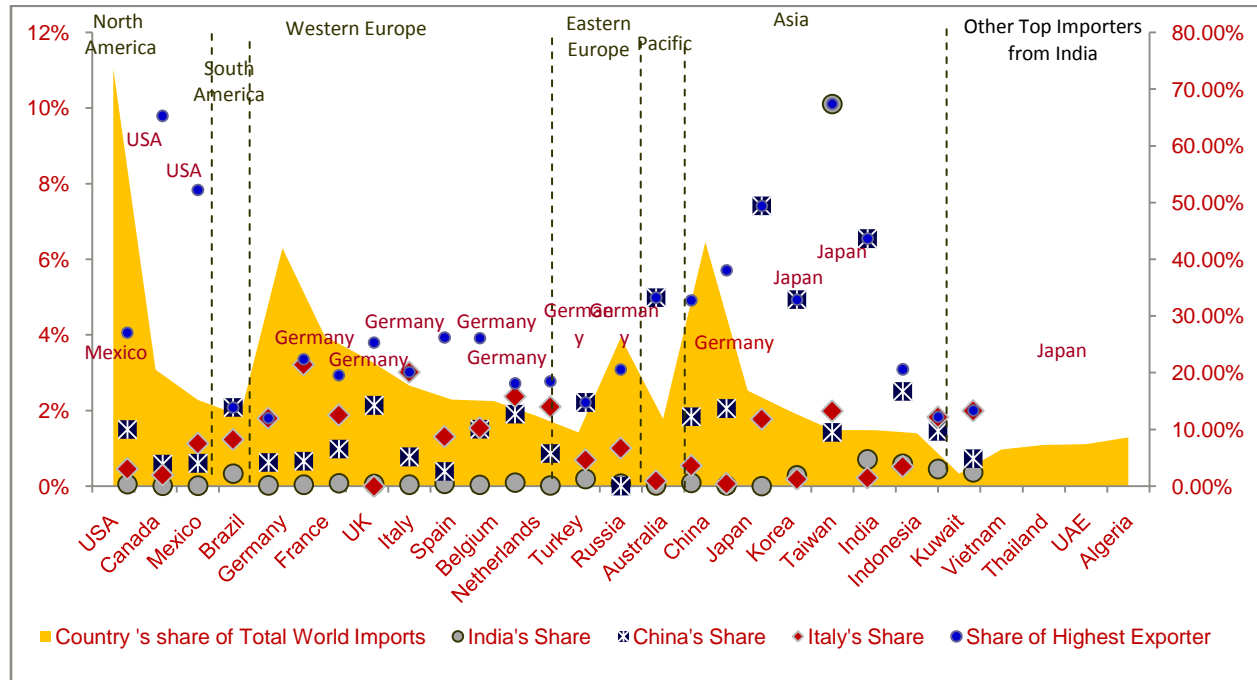


Capital Goods: Market Composition

In this section, the top exports markets for each segment within Capital Goods Industry have been identified and contribution of India vis-à-vis other competing countries in each market's imports is mapped.

Process Plant & Machinery



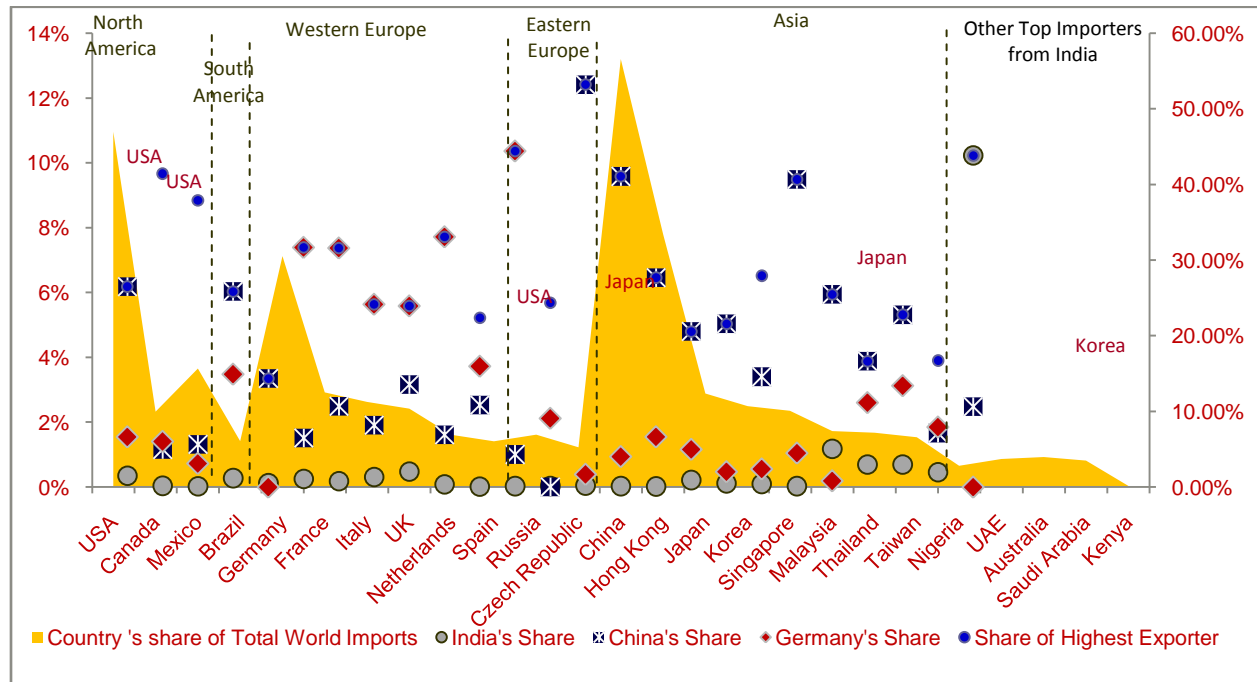
The world Process Plant & Machinery export market is primarily dominated by China across all geographical regions. However, more than a quarter of the top 20 markets are being serviced by Germany as well.

China is leading in Asian countries as compared to India, Italy and Germany. On the other hand, Germany has got substantial share in European countries. Italy might not have clear advantage in any of the top importing countries but still its share is considerable in these countries.

India is currently not among the top exporters of process plant and machinery. In-fact its share is miniscule in all the top 20 importing countries. India has relative advantage only in Kuwait.

In order to achieve global competitiveness in process plant and machinery export, India needs to benchmark various levers like regulatory & policy environment and productivity & efficiency parameters with China and select European countries like Germany. It may also be probed to understand the sources of advantage of India in Kuwait. Italy may be studied for understanding the stimulants of the growth.

Electrical Equipment



The world Electrical Equipment export market is primarily dominated by China across all geographic regions. However, more than a quarter of the top 20 markets are being serviced substantially by Germany as well.

China dominates Asia and has substantial share in all other top importing countries. On the other hand, Germany has an edge in European countries which is also evident from its share in countries namely France, Italy, UK, Netherlands, Spain and Czech Republic.

Few of the top importing markets are also being served by USA and Japan.

India is currently not among the top exporters of Electrical Equipment. In-fact its share is miniscule in all the top importing countries. India has relative advantage only in Kenya.

In order to achieve global competitiveness in electrical equipment export, India needs to benchmark various levers like regulatory & policy environment and productivity & efficiency parameters with China and Germany. It may also be probed to understand the sources of advantage of India in Kenya.