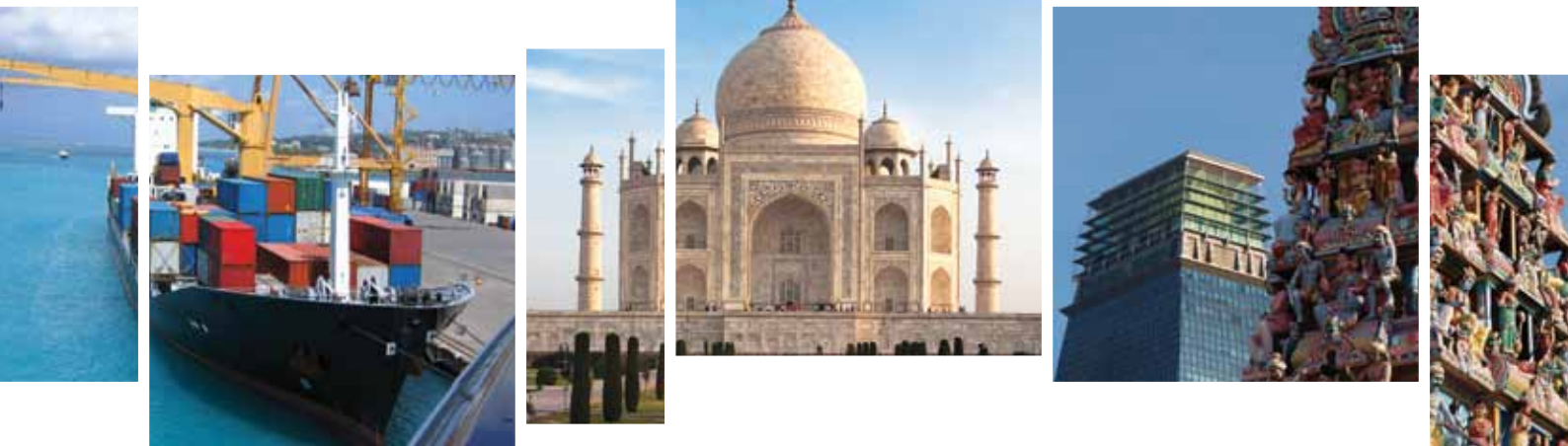


Queensland environmental goods and services export opportunities

India



Market trends

- There are significant global opportunities for Queensland environmental goods and services exporters. The global market is worth more than US\$1 trillion and is expected to increase to more than US\$3 trillion by 2020.¹
- India presents significant opportunities for Queensland environmental goods and services exporters. India is one of the largest and fastest growing economies in the world and one of the fastest growing markets for environmental goods and services. India's market is estimated to be worth more than US\$10 billion with annual growth of 10–12 per cent.²
- Growth in India's environmental goods and services market has been fuelled by massive urbanisation and industrialisation. Two of the largest segments of India's market are waste management (worth more than US\$2 billion annually) and pollution control equipment (worth more than US\$3 billion annually). Both segments are growing at more than 10 per cent per year.³
- Other major segments include water and wastewater technologies and services⁴, hazardous waste management, environmental monitoring services and environmental consulting services.

¹ Roland Berger Strategy Consultants (2009) and BERR (2009 and 2010). Environmental goods and services include solutions for problems such as air, noise and marine pollution, land and water contamination, as well as activities such as environmental analysis and waste management and recycling.

² US Senate (2009), UKTI (2010 and 2008) quoting US Commercial Service, Environmental Business Journal (2006).

³ Ibid.

⁴ For more information, see *Queensland Water and Wastewater Technologies, Services and Infrastructure Export Opportunities: India* at www.export.qld.gov.au

- India is responding to pressures for greater attention to be paid to the environment, with the country being part of a number of international environmental agreements. There is also growing grassroots activity in relation to issues of climate change and the environment, with growing public concern and media pressure for policy development. These pressures are supporting the growth of the environmental market.
- Foreign direct investment of up to 100 per cent is allowed in most environmental activities including the manufacture of pollution control equipment and refuse and sewage consultancy services. Domestic firms are engaged in both long-term strategic partnerships and joint ventures with international companies.

Queensland capabilities

Queensland companies are developing world-leading expertise in environmental goods and services.

Queensland expertise includes:

- waste management
- mine site and soil rehabilitation
- pollution control equipment
- water and wastewater technologies and services
- hazardous waste management
- environmental monitoring services
- environmental consulting services.

Opportunities for Queensland companies

Trade and Investment Queensland has identified a range of opportunities in India for Queensland environmental goods and services exporters including:

- design and construction of sanitary landfills
- engineering and consulting services on waste collection and transportation
- landfill treatment
- waste treatment plants
- urban water management
- outdoor compositing
- biological-mechanical waste treatment
- electronic waste treatment and recycling technologies
- plants for processing and recycling construction and demolition wastes
- hazardous waste management/treatment technologies
- design of landfill sites for hazardous waste and incineration
- hazardous waste consultancy services
- hazardous waste handling, collection and transportation equipment
- air pollution control and monitoring
- environmental consulting services.

Did you know?

- India is one of the largest economies in the world, having joined the trillion dollar economies in 2007.
- It is estimated that India's GDP growth will outpace China's by 2012 and will continue to do so through to 2030, aided by demographics among other factors.
- India has a vast growing domestic market of over 1.2 billion people. On some estimates 400 million people will enter India's middle class over the next 15–20 years.
- The Indian market for low carbon and environmental goods and services (which includes renewable energy technologies and emerging low carbon technologies as well as more traditional environmental technologies) is worth US\$315 billion and is fourth after the US, China and Japan, with a 6 per cent share of the global market.
- According to the US Senate, India is the fastest growing environmental goods import market in the world.
- Over the next 20 years, India will undergo an urban transformation, the scale and speed of which has not occurred anywhere in the world except in China. By 2030, India will have 68 cities with populations of more than one million, 13 cities with more than four million people and six mega-cities with populations of 10 million or more. At least two of these (Mumbai and Delhi) will be among the five largest cities in the world.

Market challenges

India has many issues with regard to municipal, hazardous and industrial waste management. The infrastructure lacks appropriate systems and technologies for effective collection, transportation and treatment of waste. Waste management systems in urban centres vary greatly. Particular states have significantly more hazardous waste generation.

- India has a severe lack of secure landfill sites and treatment, storage and disposal facilities. There is also a lack of incineration facilities and waste handling and management systems.
- There are critical levels of air pollution in West Bengal, Gujarat, Bihar, Pondicherry, Madhya Pradesh and Rajasthan. According to India's Central Pollution Control Board, there is an immediate need to improve and upgrade the existing air monitoring network in India.
- India is the largest user of groundwater in the world. More than 60 per cent of irrigated agriculture and 85 per cent of drinking water supplies are dependent on groundwater. Use of pesticides in farming and poor agriculture practices are impacting hugely on groundwater quality and general availability.
- It is important that Queensland environmental goods and services firms that are considering exporting to India, research the opportunities and their potential competition in the Indian marketplace and identify niche market opportunities for their environmental products and/or services.
- Forming partnerships or joint ventures are the most common entry strategies for international companies in India.
- The pricing of environmental products and services needs to be decided on the basis of affordability for better acceptance in the Indian market.

Can Trade and Investment Queensland assist you to export to India?

Trade and Investment Queensland is headquartered in Brisbane and maintains representation across the state and in 17 global locations including India.

Trade and Investment Queensland India is situated in Bangalore, providing export advice and assistance to Queensland businesses. There are also advisors located in Mumbai and Kolkata.

In addition, we have Brisbane-based specialists on the Indian market and the clean technology sector who work closely with our network of export advisers throughout Queensland and overseas. This network enhances opportunities for mutual support and collaboration to help build the export capability of Queensland firms and drive export growth.

Can Trade and Investment Queensland help to make exporting easier for you?

Export Hotline

1300 363 711 (8.30 am–4.30 pm Monday to Friday)

Telephone

+61 7 3224 4035 (8.30 am–4.30 pm Monday to Friday)

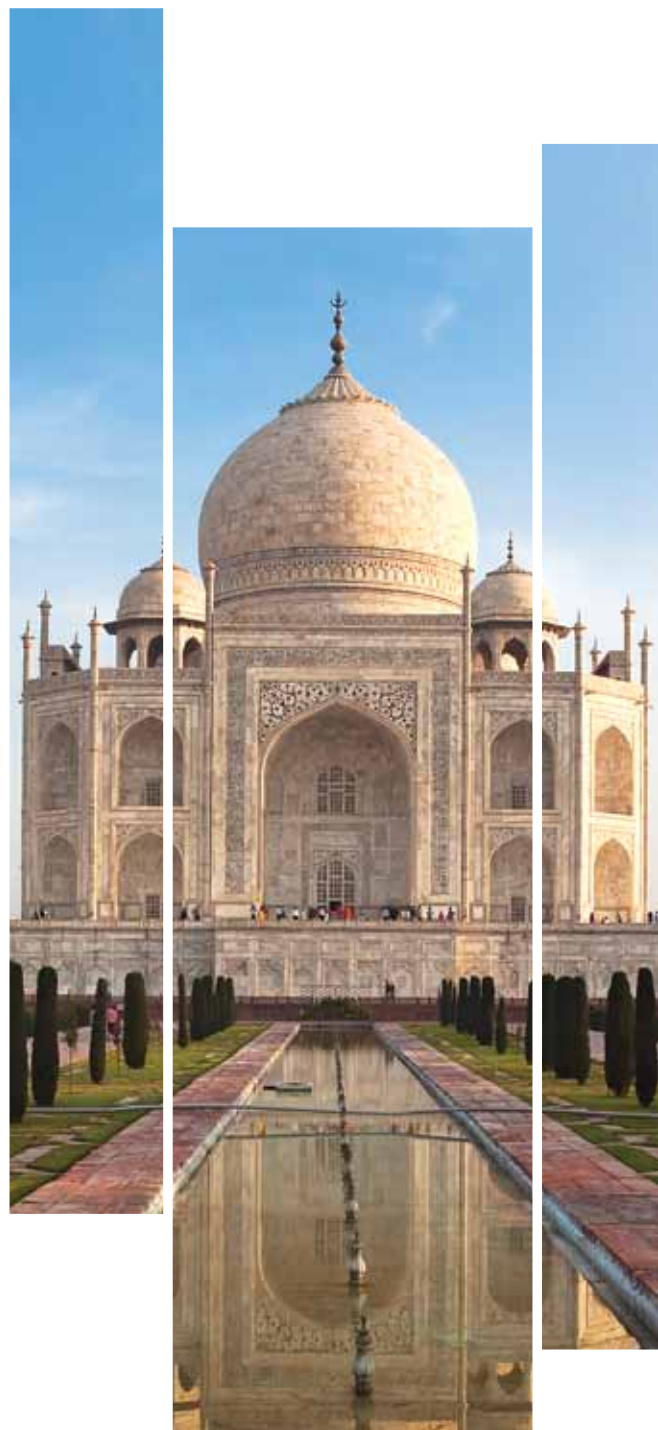
Related publications

See also *Queensland Water and Wastewater Technologies, Services and Infrastructure Export Opportunities: India*.

For more information about this publication or others in the Queensland clean technologies export series, please contact Strategic Projects, Trade and Investment Queensland on +61 7 3224 4035 or visit www.export.qld.gov.au

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