IVC
INDIAN VINYL COUNCIL

News Letter

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Vinyl is an integral part of our day to day life

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From the desk of Editor

Speaking about the PVC market in India, almost 3/4th of the market is from the pipes and fittings sector. However, internationally, PVC is mainly consumed in the windows, flooring, and automotive sectors.

The industry is navigating an era marked by massive domestic capacity additions, enhanced quality parameters and an unprecedented government infrastructure push.

In India, government schemes and infrastructure growth are the core drivers of the PVC sector.

Recently, growth in the Indian PVC market has been directly linked to Union Budget allocations for clean water, rural irrigation, and urban sanitation.

The following three Government initiatives are playing an important role in pepping up the PVC market:

Jal Jeevan Mission & AMRUT 2.0: With the Mission proposed for extensions into 2028 with enhanced outlays, massive downstream conveyance requirements have emerged. Millions of new tap connections are creating fixed, utility-approved pipelines nationwide.

Agricultural Modernisation: Schemes like the Pradhan Mantri Krishi Sinchayee Yojana (PMKSY) are funding large-scale agricultural micro-irrigation networks. The good news is that PVC pipes are replacing older channel systems to prevent water loss from borewells to fields.

Real Estate & PMAY: The rapid execution of the Pradhan Mantri Awas Yojana (PMAY)—with well over 90 lakh urban houses completed—has sustained massive demand for building materials like internal plumbing, electrical conduits, and uPVC window frames.

India is undergoing major structural shifts in the PVC sector. This is creating a conundrum of import vs self-sufficiency.

Historically, India has been importing 60 per cent of its raw material requirement of PVC resin. Especially from China.

But two key developments are giving a push to self-sufficiency in the PVC sector:

- Anti-Dumping Duties & BIS Norms: The Directorate General of Trade Remedies (DGTR) recommended stricter anti-dumping duties on PVC resin imports. Combined with mandatory Bureau of Indian Standards (BIS) certifications, India is systematically choking off subpar foreign supply to protect domestic manufacturers.
- The Mega Capacity Wave: Two corporate giants are leading massive domestic capacity additions. The Adani Group (in Mundra, Gujarat with 2 Mln Tns) and the Reliance Industries Ltd (at Dahej and Jamnagar with 1.5 Mln Tns). These planned additions could significantly change the way India does PVC business.

Structural shifts are therefore happening. Self-reliance and improved quality parameters are bringing new developments in the PVC market. Expect a lot of activity, competition and enhanced usage. PVC business will rock sooner rather than later!



Robin Banerjee

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All about the Indian Vinyl Council



The Indian Vinyl Council is set up and exclusively dedicated to the cause of entire PVC value chain. The objective of the forum is to serve all the stakeholders of Vinyl Family, i.e the resin producers, additives and related chemical producers, converters, processing and ancillary equipment manufacturers, recyclers of Vinyl products and the end users. With the active and harmonious participation; the members, end users and the public at large will all stand to reap considerable benefits.

The Council will play a pivotal role as the hub of advocacy between the government (state and central), policy makers, regulatory bodies and industry stakeholders to pave the way for the industry by eliminating obstacles and opening the doors to expand the market for the Vinyl industry.

Adding greater momentum to the growth of the Vinyl industry through networking will also be one of the core responsibilities of the Council. It will work towards increasing access to the industry's leaders and enabling them to connect seamlessly with suppliers, academia, regulators, scientists and experts through seminars, conferences, technical meetings and other events.

One of our top priorities is to ensure the efficient diffusion of knowledge to all our members, on the state of art technology, market perspectives, statistics & information and details of global initiatives on sustainability… all relevant to the Vinyl and allied industries.

Our focused approach is to work towards the welfare of mankind and encourage responsible care in an environmentally sustainable manner as practiced and specified in circular economy principles and models.

We strongly believe in supporting & encouraging innovation, and training & skill development within the Vinyl value chain, to facilitate raising the competency and the level of industry to global standards.

We are also committed to developing technical standards for maintaining quality and consistency to enhance the acceptance of Poly Vinyl Chloride and related products and multiply its application in all spheres of life.

IVC Objectives

- To promote and advocate all round development of the entire Vinyl industry comprising of all elements of the Vinyl value chain
- To build a positive image of Vinyl products in eyes of the end-users as well as society at large.
- To assist and collaborate with the government and non-government bodies and statutory authorities for formulating industry related policies including codes and standards and seek representations from such bodies.
- To promote and support standardisation and quality assurance programmes to encourage regulatory compliances.
- To create awareness and educate the end users of the value proposition of PVC products including energy conservation, eco-friendliness and sustainability.
- To support and encourage innovation, training and skill development within the Vinyl value chain and thereby raise the level of industry to global standards.
- To institute and/or fund scientific and economic research in the industry connected with PVC and its products.
- To provide a forum for member associations to collaborate for broadening the market for PVC products.

PVC Self-Reliance: The industry imperative



Sh. Kuchibotla Chandrashakher,
Head, PVC Business,
Reliance Industries Ltd.

India's PVC and vinyls industry stands at an inflection point: the market is structurally attractive, but its value chain remains vulnerable to global oversupply, geopolitical disruption, import dependence, and policy uncertainty. The central strategic question is no longer whether India will consume more PVC, but whether it can build the domestic resin, conversion, and application ecosystem needed to capture that growth, profitably and sustainably.

Executive overview

Global PVC markets moved through a full commodity cycle in FY25 - 26, beginning with oversupply and margin compression, bottoming in late 2025, and then recovering in early 2026 as shutdowns, idling, and geopolitical disruptions tightened supply. In India, these global shocks were amplified by import dependence, a fractured distribution structure, delayed regulatory actions, and weather-linked demand weakness, especially in pipes and fittings, the country's dominant downstream segment. At the same time, the medium-term outlook remains compelling: India's PVC demand is projected to grow at ~6% CAGR between FY25 and FY30 against a global demand projection of ~3% CAGR during the same period.

India is one of the world's strongest engines of PVC demand growth, yet a meaningful share of value creation through resin and finished-goods imports is being captured offshore, mainly in Northeast Asia and especially China. A credible pathway to self-reliance therefore requires more than new capacity announcements – it requires stability in policy, confidence in price discovery, development of high-value downstream applications, and a sustainability narrative that is commercially competitive rather than merely compliant.

A global market reset



The global PVC market entered 2025 under pressure from structural oversupply. Global consumption stood at ~49.4 MMT against capacity of 63.7 MMT, indicating an industry running ~78% OR, which is below a healthy utilization level. Capacity addition of ~2MMT, largely from China, met weak global construction and housing demand, resulting in margin compression and rationalization of ~1.4 MMT.

The global geopolitical scenarios made PVC markets go through a roller coaster of price movements. Key benchmarks (CFR China, CFR Asia, FOB US) fell to multi-year lows before recovering modestly in early 2026, post-rationalization announcements and VAT rebate removal proposal by China, essentially balancing the supply-demand dynamics and correcting the prices.

However, by the end of Q1CY26, the prices spiked close to Covid-era levels following the geopolitical disruptions – before entering the potential downhill cycle. The market is yet to see the price levels settle post the global unrest situation and fragile feedstock supply.

US FAS Houston hit $585/MT in mid-January 2026, and peaked to $1000/MT by March-2026 end. CFR Asia touched around $600/MT mid-January 2026, before spiking to $1000-1200/MT by end of March 2026.

These movements exposed a rather more fragile global market structure. Self-sufficient systems such as the US and China proved more resilient to shocks, while import-dependent regions such as South Asia experienced greater volatility in landed prices, freight costs, and availability. That asymmetry is now one of the defining strategic realities for Indian PVC buyers and investors.

Beyond Economics: Why Geopolitical Risk is a potential Vinyl Premium



Geopolitics has become a cost input. The Strait of Hormuz, through which roughly 20% of global crude trade passes and through which a substantial portion of Asian naphtha flows, has become a critical pressure point for the vinyl chain. US-Iran tensions and the risk of Hormuz disruption raise crude, naphtha, gas, freight, and war-risk insurance costs in ways that materially affect EDC, VCM, and PVC economics.

For India, the vulnerability is particularly acute upstream, as about 40% of India's sea borne crude flows via Hormuz, increasing exposure to freight rerouting, delays, and input-cost spikes. In such an environment, India's PVC resin import dependence, which is generally seen more of a strategic security than a commercial issue, has revealed a paradox: even as NEA producers declared Force Majeure, the market didn't see a volume crunch. Instead, supply remained fluid as producers competed aggressively on price to keep material moving, proving that in a crisis, competitive pricing often trumps supply disruption.

This proves geopolitics alters competitive positioning within the global PVC chain. US producers benefit from ethane-based feedstock insulation, while China retains strategic flexibility through coal-to-chemicals and acetylene-based PVC routes. When oil-linked systems are disrupted, coal-based carbide

PVC can gain relative advantage, effectively shifting short-term market power toward China despite its own oversupply pressures.

India's PVC market: large, growing, but stressed



India's domestic PVC market remains fundamentally attractive because of its linkage to infrastructure, agriculture, urbanization, sanitation, and housing. The FY27 domestic demand is estimated to be 4.7 MMT and expected to rise to 6.5 MMT by FY30, underpinned by strong infrastructure-led growth. Per capita PVC consumption is seen at 3.3 kg in 2025 compared with a projected ~8 kg over the course of seven to ten years, reinforcing the headroom for structural demand expansion.

Yet FY25 – 26 also exposed the market's fragility. We saw roughly 5% year-on-year decline in industry growth, driven by prolonged monsoon conditions, weaker Agri-pipe demand, soft institutional purchasing, and heavy inventory accumulation during periods of policy uncertainty. India's average inventory reached to ~20 days in November '25, reflecting front-loaded imports and slower offtake.

India's PVC market is not only demand-led, but is distribution dependent and policy-sensitive. Demand may be structurally positive, but profitability and investment confidence depend on whether the market can reduce volatility and improve visibility across the resin-to-conversion chain.

A pipe-dominated, fragmented demand structure

PVC in India is still overwhelmingly a pipes-and-fittings story, 75% of domestic PVC consumption is concentrated in pipes and fittings, a much higher concentration than in many mature global markets. This concentration reflects the deep connection between PVC and irrigation, water management, sanitation, plumbing, housing, and public infrastructure.

That structure has two consequences. First, it makes demand highly responsive to monsoons, rural cash flows, and government project execution. Second, it limits value capture when higher-margin downstream segments are underdeveloped domestically or are increasingly served by imports.

The processor base reinforces these dynamics. India has around 2,400 PVC processors, with a long tail of small and unorganized players leading to intense price competition, low entry barriers, and uneven product quality. While the top of this pyramid provides revenue stability, the highly fragmented bottom is susceptible to short-term swings in resin availability and pricing, mostly from trader influences.

Import dependence and trader control

The most persistent structural weakness in India's PVC



ecosystem is import dependence. Domestic production in FY26 was 1.43 MMT vs demand of 4.27 MMT, implying that a large portion of the market remains exposed to global resin flows. 60–65% of imports are routed through traders. Hence, the market's immediate price signals and availability are often shaped by inventory behavior rather than end-user fundamentals alone.

Import data to India shows meaningful volatility by origin and by month. China, Japan, Taiwan, South Korea, the US play meaningful roles, but China's role stands out because its exports have risen structurally and because Chinese pricing near marginal cost has encouraged downstream value migration away from India. The top five countries mentioned above account for ~85% of PVC imports.

This is of significance because import dependence is not neutral. India may save on spot resin cost in periods of global oversupply, but it loses control over timing, quality consistency, price discovery, and strategic capacity addition.

Policy uncertainty as a market amplifier



BIS requirements, quality control orders, anti-dumping measures, tariff reversals, and enforcement timing all affected trader behavior and import timing, contributing to speculative cargo arrivals and unstable inventory cycles.

This indicates that even when the direction of regulation is broadly supportive of domestic industry, uncertainty in implementation can produce the opposite short-term effect by encouraging front-loading, destocking, or opportunistic imports. In PVC, where margins are thin and converter behavior can change quickly, policy ambiguity can become a direct driver of pricing instability.

A more investable market therefore needs not only favorable policy, but predictable policy. Investors considering domestic resin, VCM, or integrated vinyl capacity are less concerned with whether prices fluctuate in the ordinary course of commodities and more concerned with whether price formation remains structurally distorted by stop-start regulation and abrupt shifts in landed economics.

Freight, inventory, and the hidden cost stack

Volatility in PVC does not arise only from resin benchmarks – it is also highly dependent on freight, insurance, rerouting, and



inventory timing. Amid ~60% increase in resin prices, freight costs spiked 120+% to $70–130/MT due to West Asia disruptions (Hormuz/Suez routes).

This has two practical implications. First, landed-cost models in India need to treat freight as a strategic variable rather than a pass-through assumption. Second, companies with stronger working-capital discipline, storage flexibility, or long-term sourcing relationships gain a meaningful edge in an otherwise commoditized market.

Inventory misalignment can rapidly destroy margin. The build-up seen in late 2025, when imports were front-loaded ahead of anticipated policy measures and demand simultaneously weakened, created a classic stressed-market scenario: high stocks, falling prices, hesitant buyers, and margin pressure across the chain. In such a context, even correct long-term demand views do not prevent short-term P&L damage.

Finished-goods imports and downstream value leakage

India is increasingly importing not just PVC resin but converted value, with finished-goods imports rising from ~0.57 MMT in FY19 – 20 to approximately 1.1 MMT in FY24 – 25 across calendaring, films, sheets, fittings, pipes, profiles, wood-plastic composites, medical products, and regrind categories.

This shift is significant because it changes the policy debate. The question is no longer just whether India has enough domestic resin: it is whether India is slowly outsourcing portions of its PVC downstream chain. Almost 90% of finished-goods imports are sourced from China and that foreign players are targeting higher-margin downstream niches through technology, branding, and acquisitions.

In effect, India's demand growth is feeding overseas manufacturing ecosystems unless domestic processors move up the value curve. Pipes may remain domestically anchored because of logistics and market fragmentation, but segments such as calendering, sheets, profiles, medical applications, and engineered vinyl products are far more contestable. This is where industrial strategy, technology transfer, and quality-led branding become essential.

Capacity creation and the case for self-reliance



Domestic capacity creation is not merely an import-substitution ambition - it is the bedrock of price stability, industrial confidence, and long-term value capture. Domestic production is projected to rise from 1.43 MMT in FY25 – 26 to about 3.65 MMT by FY29 – 30, materially improving India's self-sufficiency ratio. Even with this expansion, India will remain substantially import-dependent, underscoring the need for accelerated domestic investments to stabilize the market while progressively reducing exposure to imported volatility.

But capacity alone is not enough. For new investments to earn acceptable returns, India needs a market where prices do not repeatedly collapse below cost of production for prolonged periods. In a commodity market, persistent volatility acts like a tax on industrialization. When signals are too noisy, the market cannot perform its core function of efficient price discovery. Reducing avoidable volatility is therefore not anti-market; it is a prerequisite for building a deeper market.

Demand outlook by downstream segment



India's PVC growth is propelled by diverse downstream segments. Pipes and fittings lead with an INR 370 billion market (2025), with consumption expanding from 3,171 KT (FY26) to 4,286 KT (FY30) via irrigation, sanitation, and infrastructure programs. The wires & cables market (INR 101 billion) sees volumes grow from 304 KT (FY26) to 499 KT (FY30), fueled by grid electrification, rail projects, data centers, and smart grids.

Window profiles & fenestration (INR 84 billion market) combine energy efficiency, modern aesthetics, and formalization, and would benefit from rising uPVC adoption despite Chinese import pressure. Calendering (INR 90 billion market) targets medical/pharma applications—where domestic differentiation will be critical to capture value.

The new frontier: emerging and innovative applications

PVC is not a mature material trapped in traditional uses, but it identifies a pipeline of new and emerging applications that can expand the value pool and improve the quality of downstream demand.

Among the most practical opportunities is hydroponic agriculture. The global hydroponics market is ~$6 billion and has current domestic PVC potential of 50 KTA. It aligns PVC with food security, controlled-environment farming, and water efficiency.

Another big opportunity for PVC is food grain storage structures for long term storage of grains without infestation and loss of grains due to storage wastage. These structures would be useful in packaging solutions too.

PVC water proofing membranes and geomembranes offer another compelling use case. Their appeal lies in durability, energy efficiency, leak-proof performance, and fast installation.

Weldable or fusible PVC pipes as well as fold and form pipes can improve joint integrity, reduce leakage, and suit trenchless applications. In a market where water loss and system reliability matter increasingly, these application upgrades could create higher-margin niches for differentiated domestic players.

Beyond infrastructure, PVC plays a decent role in sports & wellness applications, including vinyl sports flooring, PVC-coated fabrics for roofing, inflatables, yoga mats, foam products, protective gear, and synthetic leather. These categories are smaller in tonnage but richer in branding, design, and export potential, making them relevant for an India strategy focused on value capture rather than resin volume alone.

Innovative applications include PVC biodigesters, mass-loaded vinyl for soundproofing, integrated solar structures, and portable auditorium systems. Individually these segments may be niche, but collectively they show that the future of PVC in India is not limited to pipes; it includes mobility, acoustics, events, agriculture, renewable infrastructure, and modular construction.

Sustainability: from compliance to competitiveness

PVC sustainability is increasingly being viewed as a driver of industrial competitiveness, with carbon markets, lifecycle accounting, and energy efficiency emerging as key economic variables. For example, lifecycle comparisons indicate that uPVC windows have significantly lower energy use (1,781 kWh) and CO_2 emissions (741 kg) than aluminum, highlighting the importance of evaluating materials across their full lifecycle.

A practical decarbonization pathway includes measures such as energy recovery, renewable energy adoption, green feedstocks procurement etc. These initiatives are not just environmental commitments, but potential sources of cost efficiency and competitive advantage in a carbon-conscious market. In this sense, sustainability and self-reliance reinforce each other. New domestic plants designed around best-available technology can be significantly more energy efficient and could operate at much lower energy intensity. For India, late-stage capacity creation can therefore be an advantage if it is designed for the carbon economy rather than retrofitted into it later.

Closing perspective

First, India needs to accelerate domestic resin and integrated vinyl investments, not only to reduce import bills but to improve market access, pricing resilience, and supply security.

Second, policymakers should reduce uncertainty by making trade, quality, and anti-dumping actions more transparent, better sequenced, and more predictable.

Third, downstream industry participants should move beyond basic commoditized conversion into higher-value applications where technology, brand, formulation, and performance matter more than the cheapest available resin.

Fourth, sustainability needs to become an operating model. Producers and processors that invest early in low-carbon utilities, renewable power, lifecycle communication, and compliance systems will be better placed to serve institutional buyers, export markets, and future carbon-aware regulations.

Finally, the industry should tell a different story about PVC. In India, PVC is not just a commodity resin - it is a material platform for water and sanitation access, affordable housing & healthcare, clean agriculture, resilient infrastructure, energy-efficient buildings, and lightweight consumer innovation. That broader positioning is essential if the sector wants to attract capital, talent, and policy support commensurate with its national importance.

Weldable or Fusible PVC Pipes



Dr. Abhijit Patil,
Secretary General,
Indian Vinyl Council

Fusible PVC pipe was first introduced in 2003 and since then, there have been more than 12,000 projects involving Fusible PVC (FPVC) pipe installation. A total of more than 16 million ft of pipe has been installed worldwide.

Fusible PVC® technology by Underground Solutions (now part of Azuria Water Solutions) combines a proprietary PVC formulation with a thermal butt-fusion process to create a continuous, monolithic, gasket-free, and leak-free piping system.

Fusible PVC™ pipe technology is now licensed in the US, Canada, New Zealand and Australia. It can be used in multiple applications, including potable water mains, raw and industrial process water, pressure and gravity sewers, and recycled water.

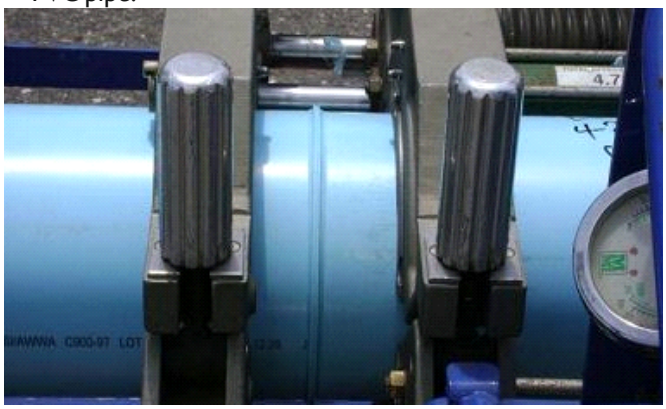
Iplex Pipelines Australia has entered into a licence agreement with the owners of the patented fusible PVC technology, Underground Solutions, to manufacture and fuse PVC pipe in Australia where it is trademarked, Novafuse.

What is Fusible PVC pipe?

Fusible PVC pipe is assembled using a thermal butt fusion process that results in monolithic, leak-free, fully restrained lengths of PVC pipe. Butt fusion of other thermoplastic pipe has existed for years. The fusion process for FPVC pipe is no easier or harder, but it is different. Using uniquely patented technology, the fusion process involves a combination of heat, pressure, and time to produce high strength joints.

Fusion:

- PVC fusion is performed on industry standard fusion equipment - which in some cases has been modified slightly.
- The fusion equipment must be in good mechanical, hydraulic, and electrical condition for use in Fusible pipe applications
- All fusions are accomplished with a data logger which records time and pressure for the duration of the fusion process. Initial heat plate temperature is also measured and recorded.
- Each fusion joint takes approximately 1.5 to 2 minutes per diameter-inch to be completed or about the same amount of time as an HDPE fusion joint. Site conditions, weather, pipe handling, etc. can affect the length of time to complete a fusion joint.
- All PVC fusion technicians are trained and qualified to the UGSI fusion process. Fusion qualifications are for specific pipe sizes and for a length of time, normally one year. Refresher training after each year is required based on level of experience.
- Testing of the fusion joint has been done in accordance with ASTM standards.
- Tensile-strength testing across butt-fused joint is done per ASTM D638.
- Burst testing of fused sections is done per ASTM D1599.
- Fusion joints completed achieve the strength of the parent PVC pipe.





When looking at how FPVC is fused in the field there are two main methods.

Pre-fusing long strings of pipe prior to installation. This method requires the space to assemble the pipe ahead of time with the benefit being that fusion is not a part of the pull-in process. It is preferred for HDDs and pipe burst applications where the success of the install can be time dependent.

Fuse and Pull- Allows the pipe to be fused in a very small footprint and is applicable for slipline installations with limited layout. The process consists of fusing on a stick of pipe, advancing the string into the installation and then repeating as many times as necessary.

These pipes meet:

- American Water Works Association AWWA C900 - Covers poly-vinyl chloride (PVC) pressure pipe and fabricated fittings for 4-inch through 12-inch diameters
- AWWA C905 - Governs larger PVC pressure pipes for diameters greater than 12 inches up to 36 inches (typically classes based on DR 18, DR 21, or DR 25)
- AWWA C605: Guides the underground installation of-and pressure testing for-PVC pressure pipes and appurtenances
- National Sanitation Foundation NSF-61 and NSF-14 certifications

- Canadian Standards Association CSA B137.3 - Canadian Standards Association specification for rigid PVC pressure pipe
- AS/NZS 1477:2017 - The joint Australian and New Zealand standard that specifies the requirements for unplasticized polyvinyl chloride (PVC-U) pipes and fittings used for pressure applications
- Formulation requirements of Plastic Pipe Institute TR-2

PVC Formulation:

- The Plastics Pipe Institute (PPI) publishes the industry standard for PVC formulation for pressure pipe in its Technical Report #2 (TR-2)
- Based on over 40 years of testing, PVC pressure pipe made to PPI TR-2 will have a Hydrostatic Design Basis (HDB) of 4000 psi - a basic requirement of PVC pressure pipe.

Applications:

Applications for this technology cover every aspect of piping installations including both pressure and non-pressure situations in the water, sewer, electrical, industrial and telecommunications industries. Fusible Pipes have been installed at over 5000 sites throughout the US, Canada, Mexico, the Caribbean islands and New Zealand.

- Water Mains (AWWA C900, C905)
- Gravity Sewer and Force Mains
- Process Water
- Water Reuse
- Irrigation and Raw Water
- Storm Drains
- Electrical and Fiber Optic Conduit
- Casings

Weldable PVC Pipes cover a full range of piping diameters from 4 inch to 36 inch (with larger sizes in development) and provide the only available method of installing a continuous, monolithic, gasket-free PVC pipe or conduit capable of being used in numerous trenchless or conventional "open-cut" applications including:

- Horizontal directional drilling
- Pipe bursting
- Sliplining
- Direct bury/Open trench

Since the introduction into the water and wastewater industry in 2003, Fusible PVC has quickly established the basis as a cost-effective material for trenchless applications through thousands of projects involving competitive municipal and industrial pipe, namely horizontal directional drilling (HDD).

Trenchless installations, including horizontal directional drilling (HDD), provide a benefit by minimizing disruption to the public and reducing overall project costs. Fusible PVC Pipe has been installed on more than 40 projects involving HDDs of more than 3,000 ft, including the longest single continuous pull-in measuring 7,000-plus ft utilizing 30-in.

Features & Benefits:

Fusible pipe installations are competitive for traditional direct bury methods in situations where the lines require shoring, restrained joints and/or cathodic protection - all of which are costly, labor intensive and reduce daily production rates. Fusible offer these advantages:

- Elimination of nearly all gasketed joints
- Restrained joints without external harnesses
- Larger flow area for the same outside diameter than HDPE
- Standard ductile iron and industrial pipe sizes
- Simple connection and reconnection
- Sizes range from 3" through 36"

Material and mechanical advantages of Fusible Pipes include:

- PVC is today's most widely utilized pipe material.
- Fusible PVC pipe provides a monolithic, fully restrained, gasket free, leak-free piping system
- PVC has superior stiffness (modulus) compared to other plastic pipe which limits long term deformation under soil load
- High tensile strength (ASTM D638) of the fused joint (up to 7000 psi) allows for higher safe pulling stresses and consequently longer installation pull-in lengths
- Low wall thickness for given pressure requirement translates into highest flow per outer diameter (OD) dimension
- Fusible PVC has a specific gravity of 1.40 - it will not float in a flooded trench
- PVC material properties have low time dependencies - the properties do not change over time - no pull-in relaxation period for example
- Standard waterworks fittings are used to tap, connect and change direction on Fusible PVC pipe systems - eliminating the use of expensive transition fittings or fused-on fittings
- PVC resists hydrocarbon permeation better than other thermoplastic pipe systems (AWWA Research Foundation)
- PVC is more resistant to water disinfectant induced oxidation than other thermoplastic pipe systems
- PVC has been used for over 50 years - owner and contractor familiarity of the pipe is well established

Case Study 1:

Complex Watermain Installation under the Rideau River Brings Municipal Drinking Water to Manotick – Demanding project using 600mm Fusible PVC pipe was one of the longest installation in Canada and first in Eastern Canada.

Challenge – One of the most challenging aspects of this extensive project was installing piping systems underneath two separate 300-meter river crossings on the Rideau River. Using horizontal directional drilling (HDD), the pipes had to be

installed deep under the riverbed — more than 5 meters. The design of the piping system also included several extremely sharp turns, meaning the bend radius requirements were significant.

Solution – The only trenchless material with ample flexibility and strength for the specific challenges of this project was Fusible PVC pipe. Boasting continuous pull-in lengths of over 1,500 meters, FPVC offered greater pull force ratings compared to High-Density Polyethylene (HDPE) as well as being lower in cost and lighter in weight. FPVC piping systems also offered unparalleled strength and a proven long service life compared to alternative piping materials.

Fusible PVC also has a reduced wall thickness relative to HDPE, with better flow rates and less material in its given pressure class. It also has gasket-free joints and excellent abrasion and scratch-resistant properties.

The success of the Manotick Watermain link project using Fusible Brute™ has opened the door to future watermain projects in the City of Ottawa and across North America.

Case Study – 2

Fusible PVC® Pipe Used to Rehabilitate Aged Steel Water Main - City of Incline Village utilizes static pipe bursting, trenchless technology

As part of The Incline Village General Improvement District (IVGID)'s capital improvement program, a section of 6- and 8-inch steel water main was in need of replacement. Approximately 2,800 feet of underperforming water main was slated for rehabilitation as part of the Water Main Replacement and Fire Flow Enhancement Project.

The solution was to use static pipe bursting methods and Fusible PVC® pipe to replace the failing steel line with an appropriately sized, factory produced, non-corrodible PVC pipeline, minimizing the trenching and surface disruption required to install it. Pipe bursting, or splitting, in the case of steel pipe, uses a pulling mechanism to simultaneously split or fracture the existing pipe and install a new pipeline in its place.

- Pipeline Details and Project Summary Project: Incline Village Water Main Rehabilitation
- Location: Incline Village, Nevada
- Pipe Length and Size: 3,027 LF 8-inch DR 14 Fusible C-900® pipe
- Installation: Pipe bursting
- Owner/Engineer: Incline Village General Improvement District
- Contractor: Q&D Construction, LLC
- Pipe Bursting Equipment: TT Technologies, Inc.

Case Study – 3

Fusible PVC® Pipe for unique requirement to Supply Power from New 700-Megawatt Generating Station in Woodbridge, New Jersey

Competitive Power Ventures' Woodbridge Energy Center was a new, 700-megawatt, gas-fired power generating station built in Woodbridge, New Jersey. Power generated by this new facility was transmitted to an existing substation three miles away. Because the high voltage transmission lines cross two wetland areas and the Raritan River, use of traditional installation methods such as overhead towers and direct burial in conduit were not feasible in these sections of the alignment. In these three locations, horizontal directional drilling (HDD) was used to install more than 11,000 feet of 30-inch Fusible PVC casing pipe.



The internal and external diameters of Fusible PVC pipe were also critical to selecting the casing and conduit material. The 30-inch pipe used for the casings needed to have the largest possible inside diameter to house the conduit bundles, while having the smallest possible external diameter to minimize the size of the HDD borehole.

Fusible PVC pipe's superior tensile strength and internal/external diameters provided the ideal material properties while offering significant project cost savings to the client. A non-metallic casing pipe also minimized ampacity loss across the HDD sections.

Case Study - 4

Consolidated Mutual Water Co. in Lakewood, Colo. (The user-owned utility) was a nonprofit entity that served roughly 85,000 people within 26 square miles. Large sections of its 325-mile network was old 4- and 6-inch cast-iron pipe that's been failing with alarming frequency.

To avoid open-cut replacement, utility managers looked at various equipment and methodologies and decided to self-perform trenchless. Crews use TT Technologies Inc.'s 800G static-pull pipe bursting system and McElroy Manufacturing Inc. thermal butt-fusion equipment to install UGSI's DR 18 Fusible C-900 PVC pipe.

This replacement methodology was twice as fast as open-cut. Typical runs are 500 to 800 linear feet, but crews have done several that are more than 1,800 linear feet long.



Industr Updates

IVC Activities for Promotion of PVC Cocoons

The PVC Cocoon is a commercially available hermetic storage container that consists of two plastic halves that are joined together with an air-tight zipper after the cocoon is loaded with sacks of the commodity to be stored.

The PVC Cocoon is a flood-protected and hermetic storage solution designed to safely store dry agricultural commodities without the need for chemicals. Made of flexible UV-resistant Polyvinyl Chloride, it guards against rodent attacks and prevents the exchange of air and moisture.

FEATURES

- Retains the taste, color, and aroma of stored commodities
- Installation requires little infrastracture
- Preserves the quality of commodities throughout long period of storage
- Maintains the germination and vigor of stored seeds
- Weather-resistant and UV-protected, usable both indoors or outdoors
- Fit for the storage of organic products
- Protects against mold growth and insect infestation
- Allows users to check the oxygen and relative humidity levels
- Commodity can be stored at ambient temperatures instead of the cold storage method

With view to promote the PVC Cocoons and create an opportunity for PVC consumption, IVC team visited M/s. GrainPro India, Pune (manufacturer of PVC Cocoons) on Thursday, 21st August 2026.

Brief on discussion covered:

GrainPro India is involved in manufacturing and promotion of PVC Cocoons for grain storage application. We met Mr. Sujit Patil, Regional Manager, GrainPro India to understand the trends & usage of PVC Cocoons in agriculture sector, growth prospects and potential for this product.

Mr. Patil mentioned that GrainPro India is promoting the PVC cocoons in grain storage applications in various states in both retail and Govt. sector. The cocoons are available from 500 Kg to 300 MT capacity. The shelf life of this product is assured for 12-15 years and can be kept in open which results in very low per Kg cost of storage.

He also revealed that the awareness creation about the product's utility value is required at mass scale. Though the potential is huge, the consumption is observed in very few areas in Maharashtra, Punjab, Rajasthan and Madhya Pradesh.

Considering very high potential, IVC would be preparing strategies for different segments (say - Sugar/Salt companies, Polymer/Additive companies, Retail stores like D-Mart/Reliance Mart etc as well as individual farmers/state APMCs etc) to promote this product as a packaging solution.

IVC will create case studies on PVC cocoon use in segments like resin, additives, chemicals, sugar/salt to showcase the value of the product and investment recovery as well as benefits in long term as the product shelf life is more than 12 years. These case studies would be useful to attract/convince large consumers.






IVC Activities for Promotion of PVC Thatch Roofs

Winroyal is manufacturing thatch roofs with 8-10 variants based on HDPE. All these variants can be manufactured in PVC also. They wanted to promote PVC based thatch roofs in past but due to lack of knowledge on UV stability the colours of PVC thatch proofs were faded.





IVC team met Mr. Shritam Navander, Director, Winroyal to understand the market trends, growth prospects and new opportunities. He mentioned that Winroyal has grown in last 4-5 years with good digital marketing efforts. They have their own installation team which execute the installation across the country.

He added that there is good interest by many hotels, resorts and individual bungalow owners. They are trying to develop various designs for attracting the end users. Plastic thatch roofs are also attracting decoration and event management industry.

The team had detailed discussion on the opportunity in developing variants in PVC as it would give the cost benefit which in turn would support better penetration and increase market size. Though the product has very little consumption base, it would certainly have good potential in future.

To start with, one of the variants (which is manufactured through thermoformed sheets) is selected for developing with PVC. IVC Team organized a meeting of Mr. Shritam Navander, Owner, Winroyal with Mr. Pranay Bhargava (Director, Amisha Vinyls) on Monday, 31st August, 2026 for discussion to develop PVC sheets for thermoforming. Samples are shared with Winroyal from Amisha Vinyls and Cooldeck Industries for thermoforming trials.

Participation of Indian Vinyl Council in IPF seminar at Kolkata

The Indian Plastics Federation (IPF) organized a Technical Seminar on "Selection & Quality Assurance of Plastic Pipes for Turnkey Water Supply Projects" with the objective of bringing together industry experts, policymakers, consultants, infrastructure professionals, and manufacturers to deliberate on the latest developments, quality standards, and best practices in plastic piping systems for water supply infrastructure.

The seminar was organized on Thursday, 3rd Sept. 2026 at ALTAIR, EM-4, EM Block, Sector V, Salt Lake City, Kolkata.

The seminar focused on the selection and application of OPVC, HDPE, uPVC, MDPE and PPR piping systems in accordance with the relevant Indian Standards (IS Codes), CPHEEO Manual and PHED specifications. It served as a platform to discuss quality assurance, durability, sustainability, and cost-effective solutions for Jal Jeevan Mission (JJM) and other turnkey water supply projects, while encouraging constructive dialogue on procurement practices and quality compliance.

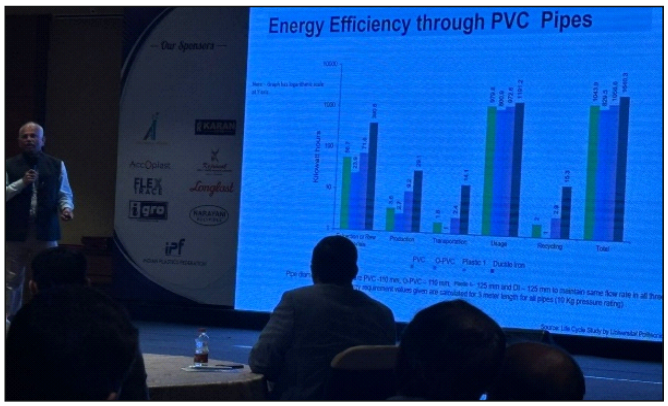
It was participated by about 110 delegates from Govt. Water departments, plastic pipe processing sector, resin and additive manufacturers etc.

Indian Vinyl Council (IVC) was invited to deliver a presentation on the role of advanced PVC solutions in strengthening water supply infrastructure, along with the valuable insights on emerging trends, innovations, and quality assurance practices.

Dr. Shreekant Diwan, President, IVC delivered a presentation covering various technical aspects of PVC Piping solutions for Water Management in the light of National and International case studies. The presentation also highlighted the technological advancements in PVC pipes, new opportunities in rehabilitation of old infrastructure, sustainability aspects of PVC pipes compared to the traditional material pipes.

The presentation was well appreciated by the Govt. officials, participants and IPF officials. IPF has expressed their wish to organize similar seminars in various parts with support of IVC.









Europe increased PVC recycling levels in 2025

Recycling rates of PVC in Europe increased in 2025, according to VinylPlus. For the full year, it says nearly 766,000 tonnes of PVC waste were recycled in the EU-27, plus Norway, Switzerland and the UK – a rise of nearly 6%. Of the total, 59% was pre-consumer waste – where factories reprocess their own waste internally – and 41% was post-consumer waste (where PVC is collected after use). In 2025, pre-consumer recycling rose by just over 1%, while post-consumer recycling was up more than 12%.

Recycling of 'flexibles' was stable at around 54,000 tonnes. Recycling of 'rigid film' rose by around 12% to 19,000 tonnes. However, the bulk of PVC is used in windows, profiles and pipes – where recycling increased in all cases. In windows and profiles, it rose about 5% to 416,000 tonnes, while for pipes it rose by 22% to 41,000 tonnes.

In its latest progress report, VinylPlus estimated that over 500,000 tonnes of recycled PVC was used last year – a near-4% increase over 2024 – with more than half of it in windows/profiles (218,000 tonnes) and pipe (48,000 tonnes). The other main uses were floor covering, traffic management and other building/ construction applications

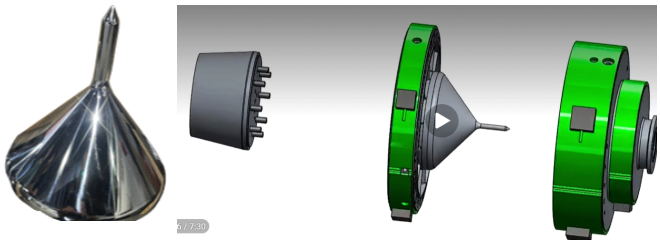
.New generation PVC Pipe Die Head by CONEXTRU, AUSTRIA

Conextru of Austria has released a new generation of pipe heads, which are suitable for use with a variety of PVC materials and formulations. The standard product line comprises eight pipe heads, with diameters of 10-1,000mm (PV 63 to PV 1000). All are designed for pressure class PN 16, even for the largest outer diameter.

The pipe heads have a 'torpedo tip' design that directs the melt into a ring-shaped flow before it enters the large volume area of the head. This gives a uniform flow around the circumference, enabling a much shorter start-up time and faster cleaning. For the thickest wall, each head has a compression ratio of over five times the cross section of the torpedo – compared to the cross section of the die set. This means no more compression sections are necessary and the flow channel after the torpedo is streamlined with continuous degreasing to the final gap.

The combination of large volume and high compression – with the small radius of the streamlined shaped spider – gives a smooth inner surface without visible spider lines. The product line allows die sets to be used on the next larger head via range adapters. The standard version has eight heating zones, which are segmented allowing thermal centring.

The heads are made of chromium molybdenum steel with a chromed surface, while the torpedo is made of stainless steel. Ceramic heaters provide internal and external heating. The torpedo tip, range adapters and mandrels are heated with special cylindrical inner heaters for optimal heat distribution.



The Earth Prize 2026 winners: Indian teens develop tamarind-based solution to remove microplastics from water

Three Indian teenagers have earned international acclaim for developing "Plas-Stick," a biodegradable solution to remove microplastics from water. Utilizing powdered tamarind seeds, their innovation offers a low-cost, electricity-free method for rural communities. The team received a $12,500 regional award for their groundbreaking environmental project.



What started as a simple concern about polluted drinking water has now earned three Indian teenagers international recognition for environmental innovation.

Sixteen-year-olds Vivaan Chhawchharia, Ariana Agarwal, and Avyana Mehta were named the Asia winners of The Earth Prize 2026 for developing "Plas-Stick," a biodegradable solution designed to remove microplastics from water using powdered tamarind seeds.



The idea reportedly emerged after the students visited rural communities where families stored drinking water in large shared containers without access to advanced filtration systems.

During one visit, watching a child drink from one of the containers drew attention to the growing issue of invisible microplastic contamination in everyday drinking water.



What Is 'Plas-Stick'?

Plas-Stick is a biodegradable powder mainly created from tamarind seed waste. According to the students, when the powder is added to contaminated water, it attracts microplastic particles and causes them to combine into larger clumps. These clumps can then reportedly be removed using a handheld magnet.

Because the solution uses biodegradable, locally available materials and does not require electricity or expensive infrastructure, the students believe it could be useful in rural and low-resource communities.

Collaboration With IIT Guwahati

The students also collaborated with experts from Indian Institute of Technology Guwahati while developing the project.

Growing Concerns Around Microplastics

Microplastics are extremely tiny plastic particles, usually measuring less than five millimetres, formed from the breakdown of larger plastics, synthetic clothing fibres, industrial waste, and packaging materials.

Recent scientific studies have detected microplastics in drinking water, seafood, human blood, lungs, placentas, and even brain tissue. While researchers are still studying the long-term health effects, many scientists consider microplastic pollution an emerging global environmental concern.

About The Earth Prize

The Earth Foundation describes The Earth Prize as the world's largest environmental competition and "ideas incubator" for teenagers aged 13 to 19. The team collectively received a regional award grant of $12,500.

One of the project's most innovative features is its use of tamarind seed waste. Tamarind seeds naturally contain binding compounds that may help attract and bind particles in water.

By using agricultural waste instead of synthetic chemicals, the students created a low-cost and biodegradable solution while highlighting how locally available resources can support environmental innovation.

Still in Development Stage

Although the project has received international recognition, Plas-Stick is still under development and has not yet undergone large-scale independent scientific testing. Further validation and testing would be required before the solution can be implemented on a wider scale.

Vinyl *is an integral part of our day to day life*

Become a Member, to enjoy the IVC Benefits

A Tribute to
Mr. Timothy Frederick Burns



December 3, 1947 – April 7, 2026

Timothy “Tim” Frederick Burns, 78 passed away on April 7, 2026 after a brief illness. Born December 3, 1947 in Brooklyn, NY, Tim lived a life characterized by kindness, humor, generosity and unwavering optimism. He graduated from Far Rockaway High School where he was Captain of the basketball team. He continued to play basketball at Orange County Community College and went on to post graduate from Franklin Pierce University.

Professionally, Tim enjoyed a distinguished career in government affairs spanning more than three decades. With a degree in psychology and an exceptional ability to understand people, he became a trusted and effective advocate. After beginning his career representing the floral industry, he spent more than 30 years leading government affairs and advocacy efforts for the chemical and vinyl industries. Tim earned the respect of colleagues across business, government and public policy. He proudly served on the Board of Directors of Habitat for Humanity of D.C. & Northern Virginia.

Tim visited India in 2006 to attend Asia Pacific Vinyl Network (APVN) meeting organized in Mumbai.

We extend heartfelt condolences to his family, friends and colleagues.

A Tribute to
Sh. Ramesh Aggarwal



January 15, 1943 – September 7, 2026

We at Indian Vinyl Council are deeply saddened by the demise of a distinguished industrialist and visionary leader **Sh. Ramesh Aggarwal, Founder of Kisan Irrigation & Infrastructure Ltd**. His remarkable contribution to PVC Pipe industry development, entrepreneurship, and society will always be remembered with great respect.

Through his vision, dedication, integrity, and exemplary leadership, he inspired generations of entrepreneurs and professionals. His commitment to excellence and his invaluable contribution to the PVC industry have left a lasting legacy.

His passing is an irreparable loss to the industrial community and to all those who had the privilege of knowing and working with him.

We extend our heartfelt condolences to his family and loved ones during this difficult time. May his noble legacy continue to inspire future generations.

INDIAN VINYL COUNCIL
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Email ID : membership@indianvinylcouncil.com
Website: indianvinylcouncil.com

Reg. No. : GUJ/21190/Ahmedabad (Registrar of Societies)

MEMBERSHIP APPLICATION

Date of application:

Name of the organization : _____

Business Address : _____

_____

City : _____ Pin : _____ State : _____

Tel. : _____ Email: _____ Website: _____

Factory Address (if applicable) : _____

_____

City : _____ Pin : _____ State : _____

Tel. : _____ Email: _____ Website: _____

Date of Establishment _____ GST No. _____

Category of Business (Please tick mark wherever applicable) (see page 3 and 4 for criteria of type of membership)

☐ Manufacturer of PVC resin ☐ Additives manufacturer ☐ Processor of PVC ☐ Equipment manufacturer

☐ Trader/Distributor ☐ Institution/Association ☐ Consulting firm ☐ Others

Annual Turnover of last financial year Rs. _____

Nature of business: _____

Name of Authorized Representatives	Designation	Specimen Signature	Mobile No	Email ID
_____	_____	_____	_____	_____
(Principle Member)				
_____	_____	_____	_____	_____
(Alternate Member)				

Category of Membership Applied for (Please tick mark wherever applicable):

☐ Privilege ☐ Associate ☐ Donor

Name of the authorized Person:

SIGNATURE

FOR OFFICIAL USE

Received on: _____

Accepted at the Managing Committee Meeting held on _____

Sign of Hon. Secretary / Auth. Signatory

Send the filled form along with the cheque to :
Indian Vinyl Council, 101/102 terminal -9, Nehru Road, neat Hotel Sahara Star, Vile Parle (E) , Mumbai 400099 .India

INDIAN VINYL COUNCIL
Admin. Of ce : 101/102, Terminal - 9 Building,
Nehru Road, Near Hotel Sahara Star,Vile Parle (East),
Mumbai - 400 099, Maharashtra. INDIA
Tel.: +91 22 67489899
Email ID : membership@indianvinylcouncil.com
Website: indianvinylcouncil.com
Reg. No. : GUJ/21190/Ahmedabad (Registrar of Societies)

FEE STRUCTURE

A) Privilege Members : Individuals in the Business of PVC, Corporate in PVC business, PVC compounders, PVC converters, PVC end product fabricators and any other company engaged in the field of PVC value chain or furthering the object of the Society, may be admitted as Privilege Member

Figures in Rupees

Please tick as applicable category					
CATEGORY (COMPANY TURN OVER)	0-100 Cr	100-250cr	250-500Cr	500-1000Cr	1000+Cr
ADMISSION CHARGE	5000	5000	5000	5000	5000
ANNUAL MEMBERSHIP FEE	10000	25000	50000	75000	100000
TOTAL	15000	30000	55000	80000	105000
ADD GST (18%)	2700	5400	9900	14400	18900
TOTAL	17700	35400	64900	94400	123900
LESS TDS(10%)	1500	3000	5500	8000	10500
TOTAL PAYABLE	16200	32400	59400	86400	113400

MEMBERSHIP RENEWAL CHARGE

Figures in Rupees

Please tick as applicable category					
CATEGORY (COMPANY TURN OVER)	0-100 Cr	100-250cr	250-500Cr	500-1000Cr	1000+Cr
ANNUAL MEMBERSHIP FEE	10000	25000	50000	75000	100000
TOTAL	10000	25000	50000	75000	100000
ADD GST (18%)	1800	4500	9000	13500	18000
TOTAL	11800	29500	59000	88500	118000
LESS TDS(10%)	1000	2500	5000	7500	10000
TOTAL PAYABLE	10800	27000	54000	81000	108000

B) Associate Member: Any society, association, chamber of commerce or other not-for-profit organization, trust, foundation etc. registered as per the applicable law and representing manufacturing industries, service providers, suppliers, end users, dealer etc. belonging to the Vinyl chain from the India, may be admitted as Associate Member of the Society

Figures in Rupees

Membership Fee	10,000
One Time Enrolment Fee	5,000
Total	15,000
Add GST 18%	2700
Total	17700
Less TDS @ 10% (for F/Y 21-22)	1500
Total Pa able	16200

Above mentioned are Annual fees and become due in April every year.

C) Donor Member: Individuals, firms, trusts, foundations, institutions, bodies corporate or associations supporting or desirous of supporting, or furthering the objects of the Society, may, on payment of the lump sum donations, as is fixed by the Society from time to time.

Donation will be accepted in multiples of Rs 1.0 Lakh and minimum of Rs 5.0 lakhs

Privilege Members of IVC



1 Reliance Industries Limited
2 Baerlocher India Additives Pvt. Ltd.
3 Goldstab Organics Pvt. Ltd.
4 Reagens India Polymer Additives Pvt Ltd
5 Bihani Manufacturing Company Pvt. Ltd.
6 Ori-Plast Limited
7 The Supreme Industries Ltd
8 Theysohn Extrusion Technik India Pvt Ltd.
9 Platinum Industries Limited
10 Veka Private Limited
11 Manish Packaging Pvt Ltd.
12 Finolex Indistries Ltd
13 Deceuninck Profiles India Pvt Ltd
14 Silvin Additives Pvt. Ltd.
15 Amisha Vinyls Pvt Ltd
16 Asia Pacific Vinyl Network
17 PVC Converters (India) Private Limited
18 Pioneer Flex Pvt. Ltd.
19 Sun Ace Chemical India (Pvt.) Ltd.
20 Encraft India Pvt. Ltd.
21 Robin Banerjee
22 Lubrizol Advanced Materials India Pvt. Ltd.
23 Bharat Milling Industries
24 Prabhu Poly Pipes Ltd
25 Cooldeck Industries Pvt .Ltd
26 Duroplast India Pvt Ltd
27 Manish Jain
28 Mobel Chem Speciality Pvt. Ltd
29 Shand Pipe Industry Pvt.Ltd
30 Benchmark Polytechnik Pvt. Ltd.
31 Kemron Wood Plast Pvt. Ltd.
32 Nishan Multi Trade Pvt. Ltd.
33 Payal Poly Plast Pvt. Ltd.
34 Indowud NFC Pvt. Ltd.
35 J B Plastochem Pvt. Ltd.
36 Jain Solar Company
37 Gauri Plastochem Pvt. Ltd.
38 Galata Chemicals Pvt. Ltd.
39 R P Plastics Industries Pvt. Ltd.
40 Maxran Corporation
41 Ganges Jute Pvt. Ltd.
42 Hardy Smith Designs Pvt. Ltd.
43 Epigral Ltd.
44 Fine Organic Industries Ltd.
45 TRA Plast Industries Pvt. Ltd.
46 Vplus Chemical
47 Billion Plastics Pvt. Ltd.
48 Prasad Pneucon Automation LLP
49 Prakash Chemicals Pvt. Ltd.
50 Neoplast Engg. Pvt. Ltd.
51 Stabplast Chemo Industries Pvt. Ltd.
52 Chemvera Specialty Chemicals Pvt. Ltd.
53 SICA Plastic Machinery Pvt. Ltd.
54 NSF Safety and Certifications India P Ltd
55 Sintex BAPL Ltd.
56 DCW Ltd.
57 RA Chemicals Ltd.
58 Mittal Enterprises
59. Wonder Polymers
60. Optiflux Industries
61. Mahavir ChemPro Pvt. Ltd.
62. Kabra Extrusiontechnik Ltd.
64. Rajoo Bausano Extrusion Pvt. Ltd.

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