

# MISSP

**MOMENTUM IN INDIA: SWISS SMEs PROGRAM (MISSP)  
BUSINESS FACILITATION SUPPORT PROGRAM**

**MISSP BROCHURE ON  
INDIAN PACKAGING MACHINERY INDUSTRY**

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## “MOMENTUM IN INDIA: SWISS SMEs PROGRAM (MISSP)”

### MISSP INTRODUCTION

“MISSP” is a business facilitation support programme launched for Swiss SMEs by the Embassy of India, Berne, Switzerland on 1st November 2017. The objective of MISSP is to boost the momentum of Swiss-Indo business relations by facilitating efficient build-up of intelligent business models capable of utilizing the inherent advantages of Indian economic structure

### Advantage

- MISSP is a unique platform that combines services rendered by government, non-for-profit and private entities – **“one stop source for business support”**
- **“Non Political and Non bureaucratic Program”**
- Compliments the **“ease of doing business” in India**
- Delivers **comprehensive know-how** about diversified and dynamic Indian business ecosystem

### Service Offering Through Extensive Partner Network

The MISSP programme offers wide range of business support services under a single platform through a consortium of programme partners focused on providing requisite facilitation services for Swiss companies

#### Knowledge Sharing/ Networking

*Common Workshops –  
Networking Events*

#### Collaboration

*Research and Development –  
Technology – Skilling*

#### Market Entry Strategy Consulting

*Market Assessment – Sales and  
Distribution – Localization – M&A*

#### Tax & Legal

*Company Incorporation – Taxation  
– Due Diligence – Audits – Dispute  
Resolution*

#### Liasoning

*Indian Central and State  
Government Authorities/  
Organizations*

#### Financing

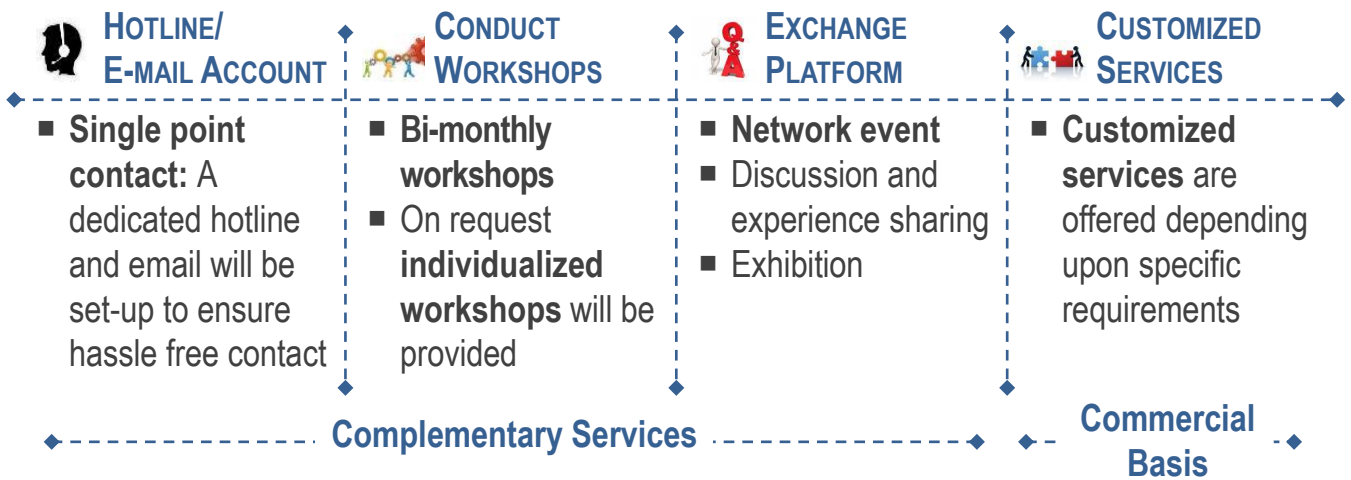
*Banking – Project and  
Trade Finance – Forex  
Management*



## “MOMENTUM IN INDIA: SWISS SMEs PROGRAM (MISSP)”

### PROGRAMME ROLLOUT AND IMPLEMENTATION

The programme is designed to provide case-by-case support to all companies in four different ways



### MISSP Workshops – Key Topics Planned, 2018 (Preliminary)



Distribution Strategies



Cross Border Tax Challenges



Supply Chain Challenges



Goods and Service Tax

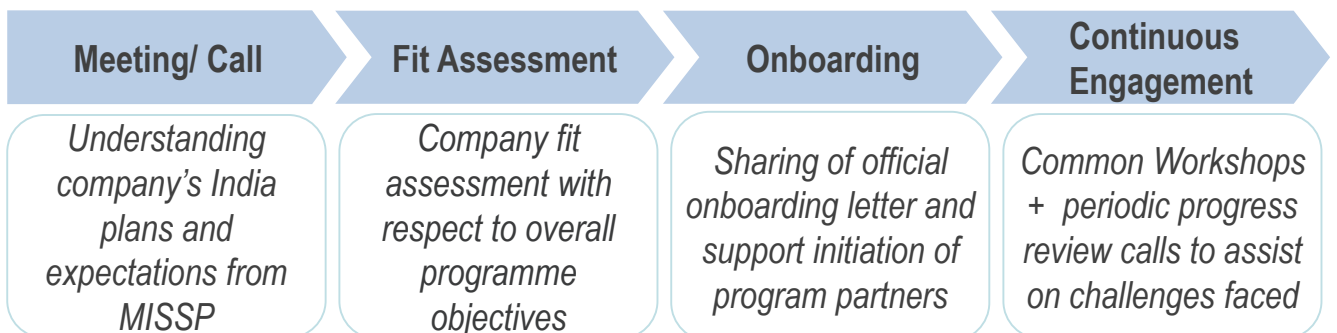


Setting up joint ventures in India



Company Incorporation

### Programme – Member Engagement Process

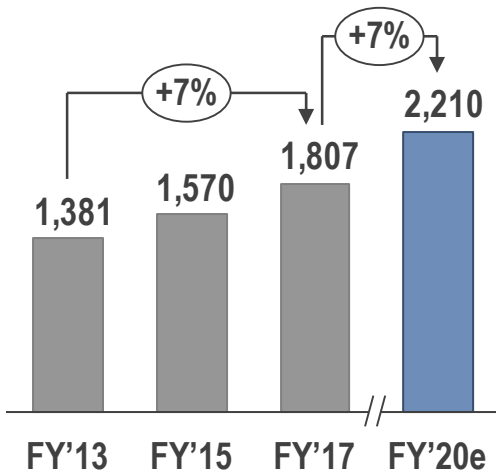




## INDIA MACRO ECONOMIC PERSPECTIVE

### GDP GROWTH AND OUTLOOK

India GDP (bln CHF)



- 3<sup>rd</sup> largest economy in the world by Purchasing Power Parity (PPP)
- India emerged as fastest growing major economy globally overtaking China in last 2 to 3 years and is expected to **outpace world's economic growth by 2X till 2020**
- **Improving macroeconomic fundamentals** – inflation falling from high of 10 to 4.7%, declining interest rate, fiscal deficit moving towards 3% target and current account deficit under control

### GOVERNMENT IMPETUS FOR GROWTH

#### BUSINESS

- GST - unified national tax
- Further Relaxation of FDI Norms
- Initiatives: Make in India, Skill India

*“FDI doubled since 2014 to reach 43.4 bln USD in FY 17”*

#### INFRASTRUCTURE

- 1.5-2x increased government spend
- On verge of becoming power surplus
- Key projects: Smart cities, Delhi Mumbai Industrial Corridor

*“~880 bln EUR infra investment planned for next 5 years”*

#### GOVERNANCE

- Digitalizing government approvals
- Implementation of bankruptcy law to simplify exits + End retrospective taxation for cross border investments

*“Highest ever increase in - Ease of Doing Business Rank”*

#### SOCIAL

- Focus on financial inclusion + eliminating corruption
- Key Initiatives: Demonetization, subsidies linkage to bank accounts

*“180 mio bank accounts opened since Jan. 2015” under govt. scheme*





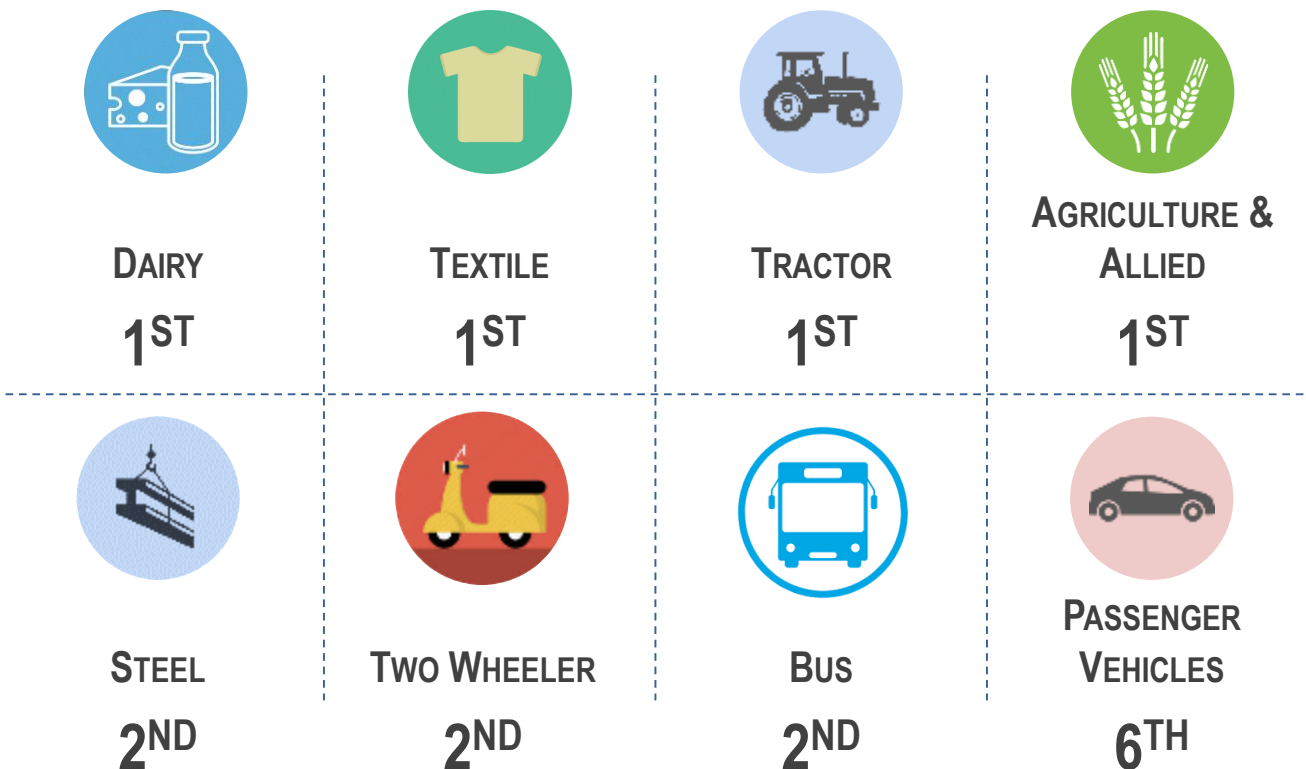
## INDIA MACRO ECONOMIC PERSPECTIVE

### IMPACT OF REFORMS AND POLICY INITIATIVES

#### GLOBAL INVESTOR'S CONFIDENCE ON A HIGH



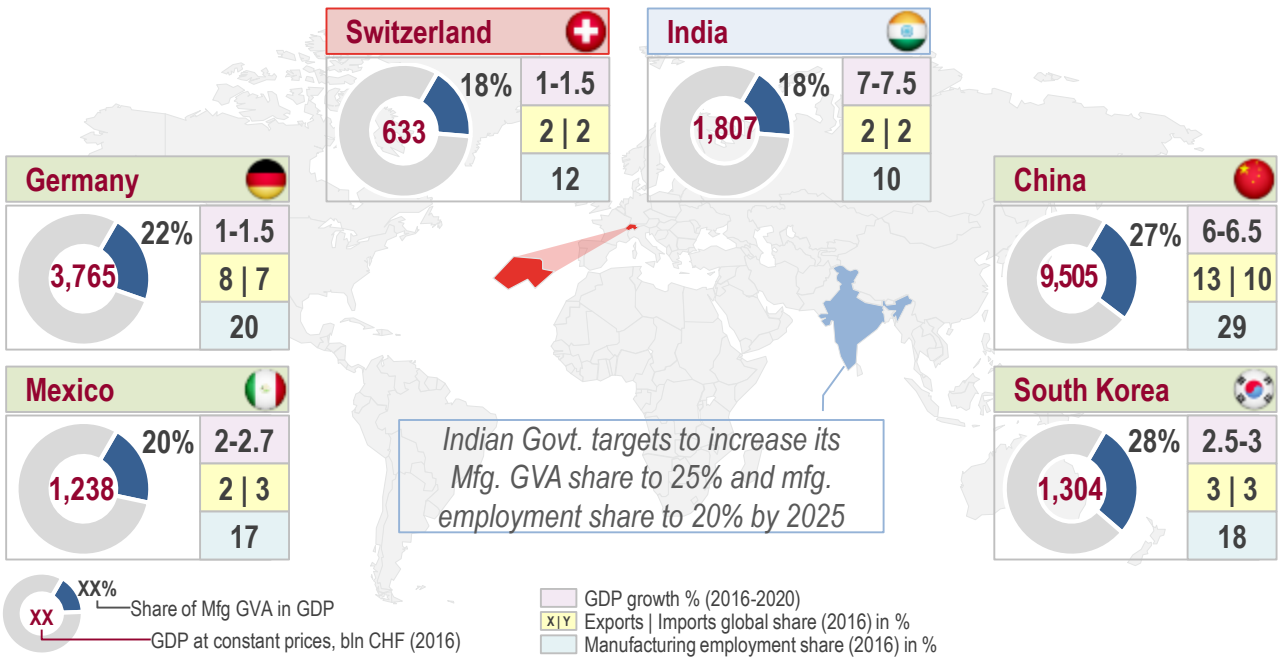
### LEADING GLOBAL PRODUCER IN KEY INDUSTRIES (INCL. AUTOMOTIVE)



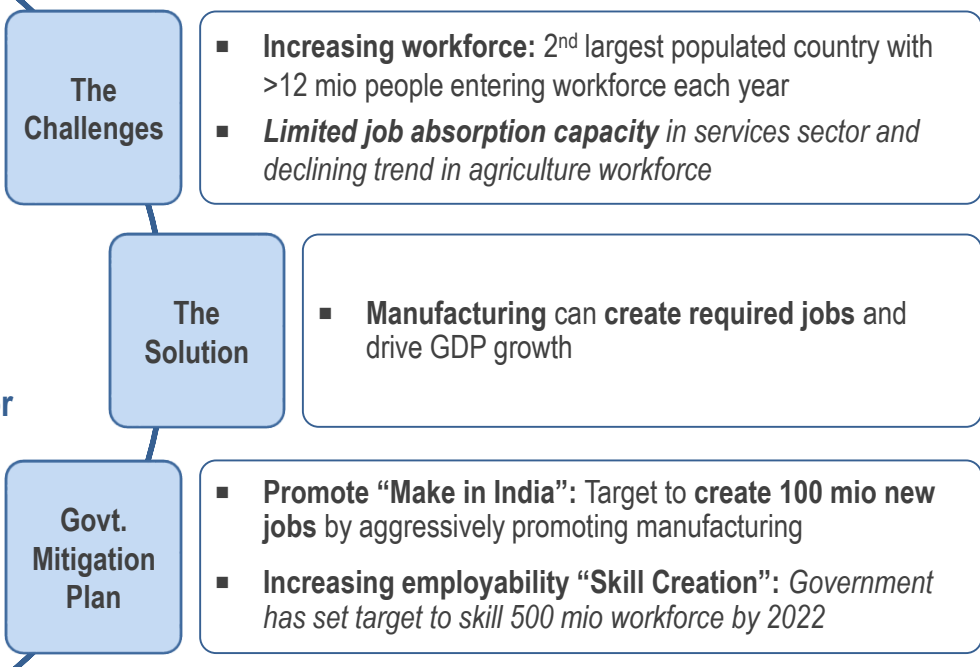
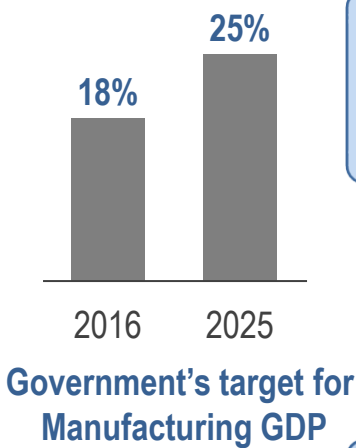


## INDIAN MANUFACTURING SECTOR PERSPECTIVE

### COMPARISON WITH GLOBAL PEERS



### WHY FOCUS ON MANUFACTURING?



Source: World Bank, IMF, WTO, OECD, EAC research

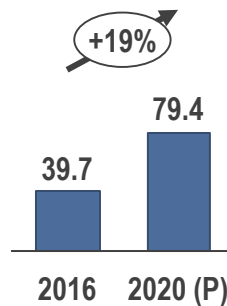


## INDIAN PACKAGING INDUSTRY

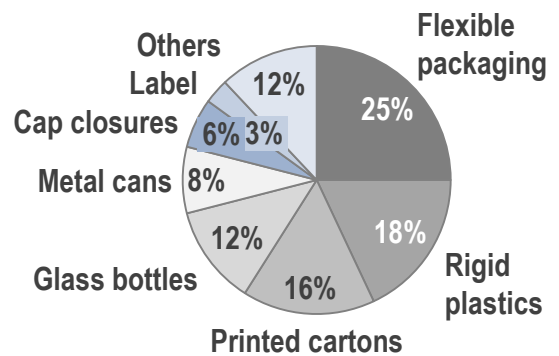
Indian packaging industry is poised to grow at a CAGR for 19% until 2020 due to the growth in consuming industries such as pharma and retail

### Industry Overview

INDUSTRY DEVELOPMENT IN BLN CHF



INDUSTRY BY PACKAGING MEDIA



### Industry Drivers

- Growing consumer industries are one of the main drivers for packaging

**PHARMA**

10% ↑

**RETAIL**

16% ↑

**FOOD**

14% ↑

- Organized retail, growing consumerism and boom in e-commerce offers huge potential for growth
- Per capita packaging consumption is 4.3kg much lower than countries like Germany (42kg) and Taiwan (19Kg)

### Technologies



Vacuum Packaging



Skin Packaging



Aseptic Packaging



Aerosol Packaging



Temper Evident Packaging



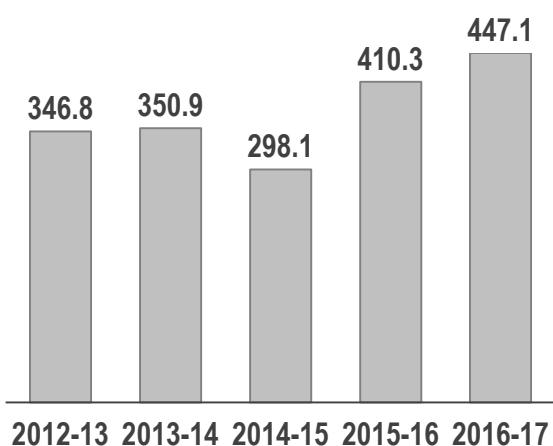
## INDIAN PACKAGING MACHINERY INDUSTRY

### Industry highlight

- India currently houses **600-700 packaging machinery manufacturers**, 95% of which are in MSME sector, located all over India
- Swiss companies such as Tetra Pak also have established manufacturing presence in India, supplying aseptic solutions, filling machines etc.**
- Germany and Italy are the largest suppliers of packaging machinery to India but focus is now shifting to Taiwan, Korea and China

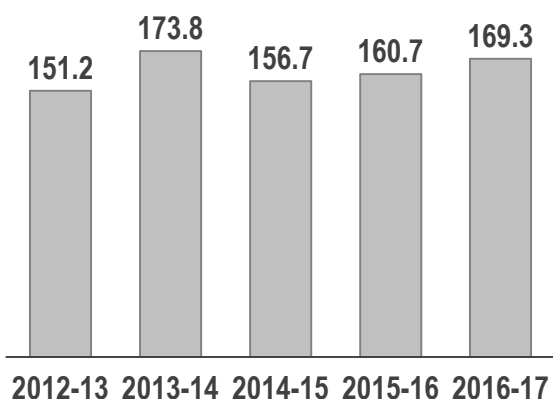
### Imports

Value in mio CHF



- Major part of the total imports come from European countries, a notable few being Germany (24.1%), Italy (23.6%) & Switzerland (7.3%) they contribute a value of 107.8 mio CHF, 105.4 mio CHF & 32.4 mio CHF respectively.
- A few geographically closer countries China (13%) and Taiwan (5.2%) also have a share of the total Imports with values of around 58.2 mio CHF & 23.2 mio CHF respectively.

### Exports



- India Exports a considerable share to emerging economies like Bangladesh (9.1%), Nigeria(6.4%) & Nepal(5.7%) with values around 15.4 mio CHF, 10.9 mio CHF & 9.6 mio CHF respectively
- India also exports two commodities(HS 84223000 & 84224000) to Germany which constitutes 5.9% of total exports valued at ~10 mio CHF.

Import Export data pertains to the following HS codes

84222000: Machinery For Cleaning/Drying Bottles/Other Containers  
 84223000: Machinery For Filling, Closing, Sealing, Capsuling or Labelling Bottles, Cans, Boxes, Bags/ Other Containers; Machinery For Aerating Beverages  
 84224000: Other Packing/Wrapping Machinery Including Heat-Shrink Wrapping Machinery  
 84229090: Parts Of Other Machinery

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## INDIAN PACKAGING MACHINERY INDUSTRY

### Key Manufacturers of Packaging Machinery

COMPANY NAME	HQ	VFFS	HFFS	HFW	CARTONER	CASE PACKER	PALLET-ISER	OTHERS
Nichrome	Mumbai	✓	✓					✓
Akash Pack Tech	Faridabad	✓	✓					✓
Bector RML	Pune				✓	✓		✓
Sidsam Group	Faridabad	✓		✓				✓
Columbia Machine Engineering	Mumbai						✓	✓
EC Packtech	Mumbai	✓		✓				✓
Wraptech Machines	Mumbai	✓	✓	✓				✓
Star Pac India	Chennai	✓	✓	✓				✓
Spheretech Packaging India	Mumbai					✓		✓
Shubham Flexible Packaging	Pune	✓		✓				✓

VFFS - Vertical Form Fill Seal Machines, HFFS - Horizontal Form Fill Seal, HFW - Horizontal Flow Wrapper, Others include Multilane Stick pack, Thermoforming Tray Sealing, Multi track pouch packing, Automatic pouch packing, Liquid filling, Capping, etc.



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