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New GST Regime Introduces 40% Slab for Luxury and Sin Goods

"Government promises relief for common man, shifts tax burden to the wealthy"

The: Government of India's sweeping Goods and Services Tax (GST) reform has introduced a new 40% slab, marking one of the most significant structural changes since GST was first implemented in 2017. While the reform simplifies taxation for everyday goods and small businesses, it places the highest rate squarely on luxury and sin goods, ensuring that the tax burden is borne by the wealthiest consumers and harmful product categories.

What Falls Under the 40% Slab?
Unlike the **5%** and **18%** product ategories.**What Falls Under the 40% Slab?**
Unlike the **5%** and **18%** slabs that cover essentials and mass-market items, the **40%** GST slab applies exclusively to:

Luxury Goods: High-end cars and SUVs, yachts, private jets, luxury watches, premium handbags, and diamond or platinum jewelry.

Sin Goods: Cigarettes, cigars, pan masala, gutka, sugary aerated drinks, imported premium alcohol, casino betting, and online gaming involving real money.

This replaces the earlier system where such items attracted 28% GST plus compensation cess, which often pushed effective taxes above 50%. By consolidating this into a flat 40%, the government aims to improve transparency and compliance.

Why the 40% Slab Matters

The Finance Ministry emphasized *four key reasons for introducing the slab:*

Protecting the Middle Class – Common goods such as packaged food, medicines, insurance, and household items have been shifted into the 5% or 18% categories.

Replacing the Cess System – A single 40% rate reduces confusion and red tape for businesses.

Discouraging Harmful Consumption – Higher taxes on tobacco, alcohol, and sugary drinks act as a deterrent while raising health-related revenues.

Raising Revenue Without Inflation – By taxing luxury and sin goods, the government generates funds for welfare and infrastructure while reducing inflationary pressure on daily essentials.

Impact on Consumers and Businesses

Consumers: Prices of essential and mass-market goods will be cheaper, while only high-income groups and those consuming "sin goods" will see higher costs.

SMEs and Startups: Relief from high tax burdens, easier compliance, and lower rates for most products will support small businesses.

Luxury Industry: Automakers and luxury brands may see prices rise slightly but benefit from simplified tax compliance. **Tobacco & Liquor Companies:** Margins may shrink as higher taxes are passed on to consumers.

Government's Balancing Act Officials describe the reform as a "win-win"it lowers costs for households and SMEs while maintaining robust revenue streams through targeted taxation. "This is a decisive step toward making GST fair, transparent, and growth-oriented," Finance Minister Nirmala Sitharaman said during the announcement.

Economists agree that the reform is both inflation-friendly and progressive. "By shifting the tax burden onto luxury and harmful products, the government ensures that growth is supported while social responsibility remains at the core," said Dr. Ritu Singh, an economic analyst.

Sidebar: GST Rates at a Glance

GST s lab	Category	Examples
5%	Essential & Public Goods	Packaged food, medicines, milk-based products, health &life insurance
18%	Mass - Market & Industry	Automobiles (regular car), cement, mobiles, electronics, consumer durable, services
40%	Luxury & Sin Goods	Luxury car, yachts, private jet, premium jewelry, tabacco, pan masala, premium alcohal, online betting & gaming

The Bigger Picture

With the festive season approaching, industry bodies expect a demand surge in consumer goods, aided by lower GST rates. Meanwhile, the 40% slab sends a clear message: India's taxation system will continue to favor essentials and small businesses, while ensuring that the wealthy and unhealthy consumption patterns pay their fair share.

Finance Ministry Begins Early Preparations for FY27 Union Budget

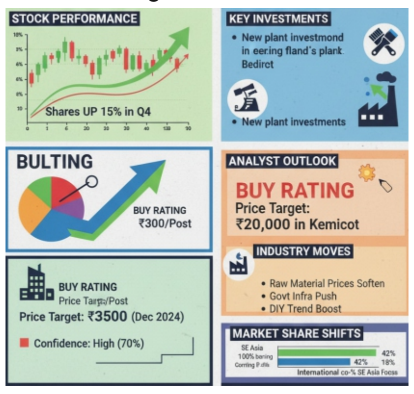
Growth, jobs, and domestic demand to take center stage

The Finance Ministry has announced that it will begin work on the FY2026-27 Union Budget starting October 9, marking an unusually early start to the process. The move signals the government's intent to stay ahead of global uncertainties while addressing domestic growth challenges.

Senior officials confirmed that consultations will be held with industry groups, state governments, startups, and SMEs. Priority areas include job creation, boosting demand, strengthening manufacturing, and expanding infrastructure investment.Economists believe that with exports under pressure due to rising U.S. tariffs, the government will rely more on domestic demand to keep growth momentum intact. Fiscal space created by higher GST revenues and disinvestment proceeds could allow for larger allocations to capital expenditure.

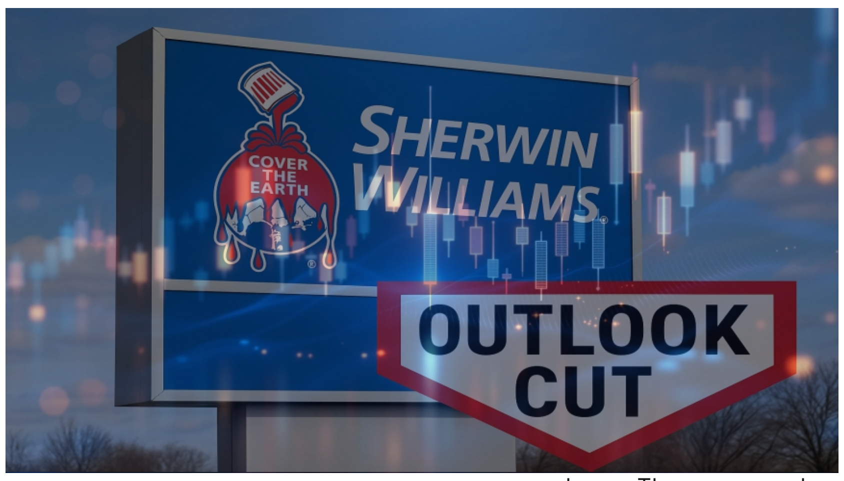
Market analysts expect the budget to also address credit support for MSMEs, tax relief measures, and incentives for sectors like renewable energy, EVs, and digital infrastructure.

Asian Paints Stock Swings on Court Case, Industry Moves



Asian Paints' shares have been on a roller coaster in early August, mirroring market sentiment over its antitrust case and the proposed JSW–Akzo deal. On August 5, the stock slipped 0.48% to ₹2,437.90, under performing the broader market. A day later, it surged 2.19% to ₹2,491.30 after updates from its High Court hearing, and on August 7, it added another 0.59% to close at ₹2,506.10Brokers say the legal battle, coupled with rising competition, will likely keep the stock volatile in the near term."Investors are watching every .headline in this space," said a Mumbai trader.

Sherwin-Williams Cuts Outlook as DIY Sales Fall



Sherwin - Williams, the US paint giant, has reported a 15.2% fall in second-quarter profit to $754.7 million, dragged down by a sharp drop in sales of DIY-focused brands such as Dutch Boy and Krylon.

While sales to professional painters and industrial customers showed modest growth, they weren't enough to offset the consumer slump. The company has lowered its full year earnings forecast to $11.20 – $11.50 per share.

Management warned that higher living costs are discouraging homeowners from spending on renovation projects—a trend that could keep pressure on results for the rest of the year.

Festive Season Demand Brings Hope for Paint Makers

After months of cautious spending, the upcoming festive season is expected to revive demand in India's decorative paints market.

Paint companies are gearing up for a strong festive season, hoping that consumer demand for home improvement and renovation will drive sales. The festive months have traditionally been peak periods for paint consumption, as households undertake refurbishments ahead of celebrations.

After a year marked by inflationary pressuresand fluctuating raw material costs, companies like Asian Paints, Berger Paints, and Kansai Nerolac are optimistic that demand will see a healthy rebound. Rural markets, supported by good monsoon conditions, are also expected to contribute to this demand upswing.

In addition to consumer paints, industrial coatings are also seeing renewed interest as manufacturing activity picks up and construction projects accelerate. The festive season is likely to set the tone for stronger quarterly results and improved investorsentiment. Industry experts believe this period could help companies regain momentum and balance the pressures they have faced from rising input costs in recent quarters.

Asian Paints Faces Antitrust Probe After Birla Complaint

"Synopsis": The Competition Commission of India (CCI) has launched a probe into Asian Paints following allegations from Birla Opus of unfair trade practices. The case could redefine dealer dynamics and intensify competition in India's ₹75,000-crore paints industry.

India's largest paint manufacturer, **Asian Paints**, is under the scanner after the **Competition Commission of India (CCI)** initiated an investigation into allegations of **anti-competitive practices**.

The complaint, filed by **Birla Opus**, accuses Asian Paints of abusing its dominant position to restrict competition in the fast-growing paints market.

The complaint

Birla Opus, which entered the paints sector in 2023 under the Aditya Birla Group, claims that Asian Paints has engaged in practices that limit dealer freedom. The allegations include **exclusive supply agreements**, preferential pricing, and restrictive dealer incentive schemes. According to Birla, these tactics have made it difficult for new entrants to establish a foothold in India's highly competitive paints market.

CCI's response

Taking cognizance of the complaint, the CCI has ordered a detailed probe to examine whether Asian Paints' conduct violates the provisions of India's competition law. While the commission has not yet passed judgment, the investigation is expected to be closely monitored by industry stakeholders, given Asian Paints' market share of over 50%.

Industry dynamics

The timing of the probe is critical. The Indian paints sector is witnessing unprecedented competition, with **JSW Paints** acquiring Akzo Nobel India earlier this year and Birla Opus aggressively expanding its product line and distribution network. Industry experts suggest that if the CCI finds evidence of wrongdoing, it could result in penalties, restrictions, and new regulatory frameworks to ensure fair play.

Impact on dealers and consumers

Dealers are at the heart of India's paints ecosystem, often enjoying long-standing relationships with manufacturers. If the allegations hold true, the case could lead to **greater freedom for dealers to stock multiple brands**, thereby increasing consumer choice and possibly improving pricing competition.

Asian Paints' stance

The company has denied wrongdoing, stating that its business practices comply with all regulatory norms and that its dealer agreements are built on mutual trust and market-driven factors. "We remain confident that our practices are in line with the law and have always worked in the best interests of consumers and partners," Asian Paints said in a statement.

What lies ahead

The CCI's probe could take months, but the very initiation of an investigation is seen as a major development in India's paints sector. Analysts believe the case could reshape competitive practices, leveling the playing field for newer entrants like Birla Opus and JSW.

If proven, the outcome may not only affect Asian Paints' dominance but also set a precedent for fair competition in India's wider FMCG and building materials sectors. For now, the industry is watching closely, as the outcome could redefine how paints are marketed and sold across the country.

Global Coatings Players Double Down on Sustainability

International paint and coatings majors are investing heavily in green technologies, reshaping the industry's future worldwide.

Across the globe, paint and coatings companies such as PPG, AkzoNobel, Sherwin-Williams, and Arkema are ramping up investments in sustainable solutions. From bio-based raw materials to energy-efficient production methods, the industry is undergoing a transition to align with global sustainability goals.

September saw announcements from multiple global players regarding new product launches, partnerships, and research into low-VOC (volatile organic compound) coatings. These developments are in response to tightening environmental regulations and

rising consumer preference for eco-friendly products.

For India, this global shift is significant. Domestic players are under pressure to keep pace with international standards, particularly as export markets increasingly demand environmentally responsible coatings. Companies that adapt early are likely to gain both regulatory clearance and consumer trust.

Industry leaders view this as not just a compliance measure but a long-term opportunity to innovate, reduce carbon footprints, and appeal to environmentally conscious buyers.

Akzo Nobel India Posts Profit Dip as Demand Slows

Akzo Nobel India has started the financial year on a weak note, with its April–June quarter profit down more than 20% to ₹910 million and revenue slipping 4%. The company blamed the drop on sluggish retail demand and stiff competition affecting its Dulux range.

The results come just weeks after the company's sale to JSW Group, adding pressure on the new owner to quickly turn things around. In an effort to keep investors onside, Akzo declared a one-time special dividend of ₹156 per share for Fy26.

Market watchers say the company will need sharper pricing strategies, stronger dealer relationships, and faster product rollouts to regain lost ground. "The premium decorative segment is feeling the squeeze as customers look for value-for-money options," noted a Delhi-based distributor.

Akzo Nobel Trims Global Profit Forecast

Globally, Akzo Nobel has cut its 2025 earnings guidance, now expecting adjusted EBITDA of €1.48 billion versus its earlier projection of over €1.55 billion. The Dutch multinational cited weaker demand in some markets, currency swings, and broader economic headwinds.

Still, the company is sticking to its longer-term goals, which include keeping its EBITDA margin above 16% and achieving a return on investment between 16–19%.It also plans to double down on efficiency measures and grow its higher-margin performance coatings business.

Analysts say the lowered forecast underlines how vulnerable even established players are to a volatile global economy and increased regional competition.

India's Q1 GDP Grows 7.8%, Service and Manufacturing Lead Surge

"Economy maintains momentum despite global headwinds"

India's economy grew at a robust 7.8% in the first quarter of FY2025-26, according to data released by the Press Information Bureau (PIB) and the Ministry of Statistics & Programme Implementation (MoSPI).

The services sector led the surge, expanding by 9.3%, while manufacturing and construction also grew strongly at 7.7% and 7.6%, respectively. Agriculture clocked a slower but steady 3.7% growth due to mixed monsoon patterns.

Officials noted that India's resilience comes despite global trade uncertainties and the burden of higher U.S. tariffs. India's economy grew at a robust 7.8% in the first quarter of FY2025-26, according to data released by the Press Information Bureau (PIB) and the Ministry of Statistics & Programme Implementation (MoSPI).

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Private consumption and investment have remained steady, bolstered by government spending on infrastructure and a revival in rural demand.

MoSPI also released updated estimates for industrial output, showing Index of Industrial Production (IIP) growth of 5.9% in July, reflecting strong activity in capital goods and consumer durables.

Berger Paints Charts ₹20,000 Crore Ambition by 2030

Berger Paints outlines an ambitious growth strategy with a goal to double revenues through capacity expansion and new product lines.

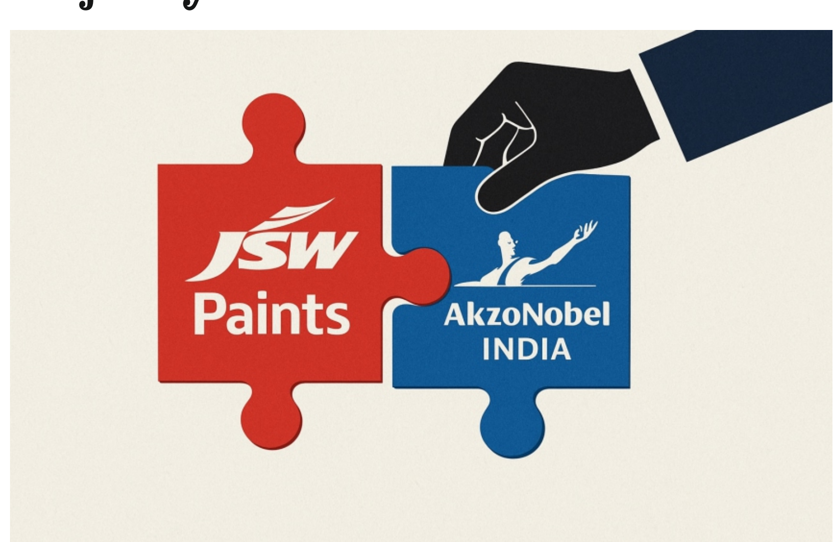
Berger Paints has announced its long-term target of achieving ₹20,000 crore in revenues by 2030. The company plans to fuel this growth through a mix of capacity expansion, innovation in premium and eco-friendly paints, and deeper penetration in rural and semi-urban markets.

The strategy includes building new plants, strengthening supply chains, and investing heavily in R&D for sustainable and performance-driven coatings. Berger is also looking at exports as a meaningful growth driver, tapping into markets in Africa and Southeast Asia.

Analysts believe the company's focus on premiumisation and green products could position it well in a sector that is becoming increasingly conscious of sustainability. By balancing volume-driven growth with innovation, Berger aims to capture both mass-market and high-value segments.

This growth roadmap places Berger Paints in direct competition with Asian Paints and the newly enlarged JSW Paints, setting up a three-way contest for leadership in the Indian paint market.

JSW Paints Moves to Buy Majority Stake in Akzo Nobel India



JSW Paints is looking to make one of its boldest moves yet, seeking the Competition Commission of India's (CCI) nod to acquire a 74.76% stake in Akzo Nobel India. The deal, pegged at over ₹12,915 crore, could shake up India's paints market and propel JSW into the top four players in the country.

If approved, JSW will gain access to Akzo Nobel's well-known Dulux brand, a wide distribution network, and technical expertise. Industry insiders say this could be a turningpoint for JSW, which has been steadily expanding in a market long dominated by Asian Paints and Berger. But the deal is likely to be closely scrutinized by the regulator, given the impact it could have on competition in the decorative paints segment.

"This is a big play in a sector where consolidation is already in full swing," said one Mumbai-based analyst. "It will likely trigger more aggressive pricing and marketing battles across the industry."

JSW Paints' Bold Move: ₹9,000 Crore Akzo Nobel India Acquisition

A landmark deal reshapes India's paint sector as JSW Paints acquires Akzo Nobel India, aiming to leapfrog into the top tier of paint manufacturers.

JSW Paints has made headlines with its acquisition of Akzo Nobel India in a deal valued at ₹9,000 crore. The move instantly expands JSW's presence in both decorative and industrial paints, giving the company access to strong brand portfolios and an established distribution network.

For years, Akzo Nobel India has been known for its Dulux range and innovation in coatings. By bringing it under its fold, JSW Paints is making an aggressive push to challenge industry leaders like Asian Paints and Berger Paints.Analysts see this as a transformational deal that could accelerate competition in India's paint market, which is projected to grow rapidly due to urbanization, infrastructure development, and rising disposable incomes. JSW Paints is betting big on its ability to integrate Akzo Nobel's global expertise with its own resources to create a dominant player.This acquisition is also a signal to global investors that India's paints and coatings sector is entering a new growth phase, attracting large-scale consolidation and investment.

Traders Weigh the Leap: When Is the Right Time to Set Up a Paint & Coatings Plant?

India's paints and coatings sector, valued at **USD 10.46 billion in 2025** and projected to touch **USD 16.38 billion by 2030** at a CAGR of nearly **9.4%**, is drawing interest not only from established manufacturers but also from traders looking to step into production. With the industry expanding, the question being asked across trading circles is: *when is the right time to make the move?*

Market Momentum

Decorative paints dominate the Indian market, with **water-borne coatings accounting for 45.9% of revenue share in 2024** and expected to grow at **9.9% CAGR** over the coming years. Acrylic resins, widely used in wall finishes and emulsions, held **36.7% share** last year. (Mordor Intelligence)

Industrial coatings, covering automotive and protective applications, form a smaller segment worth **USD 3.8–6.0 billion**, with growth projected at **3–5% CAGR**, slower than decorative paints. (IMARC Group)

These figures suggest opportunity, especially in mid-tier cities where demand for affordable decorative paints often outpaces supply. Traders, with direct insight into local shortages, see potential in setting up small manufacturing units to plug these gaps.

Margins Under Pressure

Trading typically yields **5–10% margins**. Manufacturing, though capital intensive, can deliver **20–30% profit margins** when raw material sourcing and operations are tightly controlled. Analysts note that traders facing pressure from shrinking trading margins are increasingly exploring private manufacturing as a path to higher returns.

Cost & Compliance

Setting up a paint plant is not without challenges. A small to mid-scale facility may require **₹5 crore to ₹20 crore**, depending on automation and capacitydepending on automation and capacity. Beyond capital, manufacturers must secure environmental clearances, establish effluent treatment systems, and invest in testing labs to meet quality standards. Experts warn that those without compliance readiness risk costly delays.

Policy Incentives

Government support provides a cushion. Under the **Micro & Small Enterprises Cluster Development Programme (MSE-CDP)**, the Government of India covers **60–70% of project costs** for eligible clusters, particularly for infrastructure and common facility centres in the chemicals and coatings sector. Projects between **₹5 crore and ₹30 crore** often qualify. (MSME Ministry) Further, NITI Aayog has proposed **export incentives, chemical production clusters, and improved port infrastructure** to strengthen competitiveness. (Indian Express) These moves are designed to ease logistics and encourage investment in coatings manufacturing.

The Distribution Advantage

Experts agree the biggest strength traders possess is their existing dealer andcontractor networks. "A manufacturing unit without a strong distribution chain risks struggling with sales. For traders, this bridge already exists," said a coatings consultant.

Conclusion

The best tiZme for a trader to step into manufacturing is when **demand gaps, capital availability, policy incentives, and distribution strength align**. While the opportunity is real, the transition demands both financial preparedness and regulatory compliance. Done right, it can transform traders into long-term industry players in a rapidly evolving market.

Synopsis

The Indian paint and coatings industry, currently valued at USD 10.46 billion and growing at nearly 9.4% CAGR, is attracting traders to manufacturing. Experts say the move makes sense when demand exceeds supply, margins tighten in trading, and government incentives support investment. With costs ranging from ₹5–20 crore and compliance requirements high, analysts caution that only traders with strong distribution networks and financial readiness should enter.

Global Paints & CoatingsMarket to Reach $256 Billion by 2032

"Synopsis": The global paints and coatings market, valued at over US$202 billion in 2025, is expected to grow steadily to nearly US$256 billion by 2032. Sustainability demands, technological innovation, and Asia-Pacific's booming construction sector are driving growth, even as raw material costs squeeze margins.

The global paints and coatings industry is entering a new growth phase, with the market projected to expand from its current valuation of US$202.6 billion in 2025 to nearly US$256 billion by 2032, according to recent reports from leading research agencies. This growth translates into a compound annual growth rate (CAGR) of nearly 3.4%, reflecting the sector's resilience amid macroeconomic uncertainties.

Asia-Pacific leads the way The Asia-Pacific region continues to be the powerhouse of the global coatings sector, commanding over 43% of the total market share. The region's rapid urbanization, robust infrastructure development, and rising middle-class housing demand in countries like China, India, and Southeast Asia have significantly boosted the demand for decorative and industrial paints.

In contrast, North America and Europe are witnessing slower growth, driven largely by renovations and sustainability-driven product replacements rather than new construction. Still, advanced economies remain critical markets for innovation, especially in eco-friendly and performance-enhancing coatings.

Sustainability at the forefront One of the most pressing challenges for the industry is the global regulatory push toward sustainability. Governments worldwide are tightening restrictions onvolatile organic compounds (VOCs), which has prompted manufacturers to invest heavily in waterborne paints, bio-based coatings, and low-VOC solutions.

Companies like AkzoNobel, Sherwin-Williams, and Nippon Paint are spearheading research into environmentally friendly coatings that not only reduce emissions but also improve energy efficiency. Smart coatings—such as self-healing surfaces, anti-bacterial finishes, and reflective materials that help conserve building energy—are quickly moving from niche innovation to mainstream adoption.

Innovation and digital transformation

Technology is reshaping how paints are developed, sold, and applied. Digital color-matching tools, AI-powered predictive analytics for consumer preferences, and nanotechnology-based coatings are beginning to redefine product offerings. These innovations not only enhance performance but also expand the application scope of paints and coatings in sectors like automotive, aerospace, and packaging.

Challenges in raw materials

Despite the optimistic outlook, the industry is not without challenges. Volatility in raw material prices, particularly titanium dioxide and pigments, continues to pressure margins. Supply chain disruptions, still lingering from the pandemic era, have exacerbated these difficulties, compelling companies to seek alternative sourcing and recycling strategies.

The road ahead

Analysts suggest that companies that balance sustainability, cost efficiency, and technological innovation will emerge as winners in the next growth cycle. Strategic acquisitions, consolidation, and investments in R&D are expected to intensify as firms race to secure long-term market positions.

With Asia-Pacific continuing to dominate demand, and Western markets leading in innovation, the global paints and coatings industry is poised for a **balanced yet transformative decade**, driven by green regulations, digital advancements, and evolving consumer expectations.

HBTU and Mercury IndustriesPartner on Packaging & Coatings Innovation

Synopsis: Kanpur's Harcourt Butler Technical University (HBTU) has signed an MoU with Mercury Industries to jointly develop innovations in packaging coatings, printing inks, and industrial finishes. The partnership aims to bridge academic R&D and industry applications.

In a bid to accelerate research and innovation in India's coatings sector, **Harcourt Butler Technical University (HBTU), Kanpur**, has signed a **memorandum of understanding (MoU)** with **Mercury Industries**, a leading manufacturer of industrial coatings and chemicals.

Focus of the partnership

The collaboration will primarily focus on **packaging solutions**, particularly innovations in can coatings, printing inks, and specialty industrial finishes. These areas are becoming increasingly important as industries demand coatings that are safer, more durable, and environmentally sustainable.

"Packaging is no longer just about aesthetics. It's about safety, sustainability, and performance. Our partnership with Mercury Industries will help bring practical solutions that can transform the packaging and coatings sector " said an HBTU official at the signing ceremony.

Industry-academia synergy

The initiative is part of a broader push to strengthen **academia-industry a**in India, ensuring that scientific research translates into practical applications. For students and researchers, the tie-up will provide opportunities for hands-on projects, internships, and exposure to real-world challenges in the coatings industry.

For Mercury Industries, the partnership brings access to cutting-edge academic research and a pipeline of trained professionals equipped with specialized skills. The company hopes to commercialize new formulations that meet global sustainability standards, giving it a competitive edge in export markets.

Sustainability at the core

One of the main objectives of the collaboration is to develop coatings that align with global sustainability trends. With increasing demand for low-VOC, recyclable, and eco-friendly packaging materials, the coatings sector faces mounting pressure to innovate. Research projects under this MoU will prioritize green chemistry and circular economy principles.

Broader impact on the paints industry

While the MoU is centered on packaging and industrial finishes, experts believe the innovations could also benefit the broader paints and coatings industry. Breakthroughs in chemical formulations, durability, and environmental safety can be adapted for decorative paints, automotive coatings, and construction chemicals.

Strengthening India's position

By encouraging local innovation, partnerships like this also strengthen India's position in the global coatings value chain. Currently, much of the cutting-edge R&D in paints is concentrated in Europe and the US. Indian institutions collaborating with industry players can help bridge that gap, ensuring homegrown solutions cater to domestic and international markets.

The way forward

The HBTU-Mercury partnership is set to roll out joint research projects over the next three years, with a focus on pilot testing and commercialisation. If successful, the collaboration could serve as a model for other universities and industries, paving the way for India to become a hub for coatings innovation.

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Indian Paint & Coating Association Inaugurates Tamil Nadu Region; Babu Thiyagarajan Appointed Chairman

"Synopsis": The Indian Paint & Coating Association (IPCA) inaugurated its Tamil Nadu Region on August 30, 2025, appointing Mr. Babu Thiyagarajan as Chairman. The move aims to boost collaboration, innovation, and industry growth in Tamil Nadu's paints and coatings sector.

Chennai, August 30, 2025:

The Indian Paint & Coating Association (IPCA) has inaugurated its Tamil Nadu Region, marking a strategic expansion of its presence in one of India's most dynamic industrial states. The launch, held on August 30, 2025, represents a major milestone in the association's mission to strengthen the paints and coatings ecosystem nationwide.

At the event, Mr. **Babu Thiyagarajan** was officially appointed as Chairman of the Tamil Nadu Region. In his new role, he will lead initiatives to foster collaboration, enhance technical knowledge, and expand opportunities for paint and coatings professionals across the state.

The new regional chapter aims to serve as a hub for **knowledge-sharing, technical assistance, and networking**, bringing together manufacturers, raw material suppliers, distributors, and industry experts. By establishing a localized body, IPCA seeks to address region-specific challenges while aligning Tamil Nadu's growing paint and coatings sector with national and global standards.Industry professionals and stakeholders present at the inauguration welcomed the initiative, highlighting the state's strong position as a hub for automobile, construction, and industrial activity—sectors that are key drivers of paint consumption.

"Today marks a proud milestone for IPCA," said a spokesperson from the association. "With the Tamil Nadu Region now active, we look forward to fostering stronger collaborations, driving industry growth, and , supporting innovation in paints and coatings across the state." The move is also seen as a step towards **regional empowerment** within IPCA's national framework allowing localized chapters to play a more active role in addressing industry demands.

As the paints and coatings industry in India continues to expand—driven by urban development, infrastructure projects, and consumer demand—Tamil Nadu's strategic importance is expected to grow further. The establishment of IPCA's Tamil Nadu Region is likely to create a stronger platform for both innovation and growth, benefitting stakeholders across the value chain.

IPCA Biennial Conference 2025 Concludes in Udaipur: A Showcase of Innovation and Collaboration

"Synopsis": The Indian Paint & Coating Association (IPCA) successfully hosted its Biennial Conference 2025 at The Ananta, Udaipur, from September 11–13. With the theme *"AVINYA – Innovate, Create, Inspire,"* the event brought together industry leaders, innovators, and professionals to discuss technology, sustainability, and the future of coatings in India. **Udaipur, September 13, 2025:**

The **Indian Paint & Coating Association (IPCA)** concluded its Biennial Conference 2025 at The Ananta, Udaipur, marking one of the most significant gatherings for India's coatings sector this year. Held from September 11 to 13, the event carried the theme *"AVINYA – Innovate, Create, Inspire,"* reflecting the industry's commitment to innovation and sustainability.

The conference opened with a formal inaugural session, followed by a vibrant **Rajasthani Night** that celebrated the cultural spirit of Udaipur. The event welcomed industry leaders, innovators, executives, and technical experts from across the country, along with members of the IPCA Apex Committee.

Across two intensive days, delegates participated in a series of **lectures, seminars, and panel discussions** covering a wide range of topics. Key sessions included turnkey solutions for paints and construction chemicals, sustainable innovations using CNSL technology, advanced emulsion technologies, and rheological additives. The program also featured discussions on pigments, waterborne epoxy systems, iron oxide pigments, wax solutions, and strategies to reduce VOC emissions.

Technical experts from leading companies such as **Tipco Engineering, Cardolite Specialty Chemicals, Bentec Organo Clays, and Jesons Industries** shared insights, while additional sessions explored carbon black, titanium dioxide, and insurance-related solutions for the coatings industry. The diversity of subjects underscored the sector's dynamic opportunities and challenges.

Beyond technical knowledge-sharing, the conference provided ample opportunities for **networking and community building**. Open house sessions, panel discussions, and a dedicated Ladies Programme encouraged dialogue and exchange among participants. The closing gala evening—with entertainment, dinner, and a lucky draw—further enhanced camaraderie within the industry.

Conference convenor **Rajiv Parekh** and regional chairpersons, including representatives from Delhi NCR and Maharashtra, reiterated IPCA's mission to elevate industry standards, introduce global best practices, and unite stakeholders toward growth and quality excellence.

The inspiring setting of Udaipur's "City of Lakes" and the modern facilities of The Ananta complemented the conference's forward-looking agenda. Organizers emphasized that **innovation, sustainability, and excellence** must remain at the heart of the coatings sector for it to remain competitive and resilient in a rapidly changing market.

As the conference concluded, delegates agreed on a unified call to action: to **innovate, inspire, and collaborate** in building a stronger, more sustainable future for India's paints and coatings industry.

Perfect — you'd like it to read more like a flowing news report without subheadings, in a natural journalist style. Here's the refined version.

Urban Slowdown Hits Indian Paint Industry

"Synopsis": India's paint sector is facing a demand slowdown in urban markets amid rising competition and price wars. Companies are banking on rural demand and infrastructure growth for stability, while projecting a revival in FY26.

The Indian paints industry, once considered a recession-proof sector, is experiencing a **demand slowdown in urban markets**. Sluggish housing sales, muted consumer sentiment, and aggressive price wars have dampened growth for leading players including Asian Paints, Berger, and Kansai Nerolac.

Urban struggles

Urban housing markets, traditionally the largest demand driver for paints, have slowed due to delayed construction activity and reduced discretionary spending among consumers. Industry insiders report that repainting cycles have lengthened, with homeowners postponing upgrades amid higher living costs."The urban slowdown is real. Consumers are spending cautiously, and many large housing projects have been delayed. This has directly impacted decorative paint demand," said an analyst tracking the sector.

Price wars dent margins

Adding to the pressure is intense competition, with new entrants such as JSW Paints and Birla Opus pushing aggressive pricing strategies. This has sparked a price war, forcing incumbents to offer deeper dealer discounts and consumer promotions. While competition has benefitted consumers with more choices and better deals, it has significantly eroded industry profit margins.

Rural demand holds firm

In contrast, rural and semi-urban markets have shown relative resilience. Government-led housing and infrastructure programs, combined with festive season spending, have supported demand. Smaller cities continue to see stronger growth in repainting activity, providing a cushion for the industry.**The FY26 hope**

Despite the challenges, paint companies are optimistic about a revival in **FY26 (2025-26)**.headwinds, but most players remain confident of a rebound by FY26, with new technologies, sustainability, and premiumization likely to drive the next phase of growth.

Factors such as easing inflation, an expected rebound in housing demand, and continued government investment in urban infrastructure are likely to support recovery. Analysts forecast that the sector could return to **double-digit growth** once macroeconomic conditions stabilize.

Shift toward premium and sustainable paints

Another trend that could aid recovery is the growing consumer preference for **premium and eco-friendly paints**.

Brands are increasingly launching water-based, low-VOC, and specialty coatings targeted at health-conscious and environmentally aware consumers. This segment, though currently small, is expanding rapidly and offers higher margins than mass-market paints.

Industry outlook

In the short term, companies may continue to struggle with squeezed profitability. However, the long-term fundamentals of the Indian paints sector remain strong, supported by urbanization, rising disposable incomes, and increasing aspirations for better housing aesthetics.

For now, the industry is in a consolidation phase. The combination of urban slowdown and intensified competition has created short-term .

Wagner Leads the Charge in Alloy Wheel Coating Innovation at Gurugram Conference

Gurugram, 16th September 2025 – The J. Wagner Powder Coating Conference on 2W & 4W Alloy Wheels brought the coatings industry together at Park Inn by Radisson, Gurugram, for a day filled with knowledge sharing, innovation, and collaboration. Organized by J. Wagner India, the event saw enthusiastic participation from industry leaders, OEMs, and coating manufacturers, with key contributions from companies like AkzoNobel and Nerolac Paints.

The conference opened with a welcome address by Mr. Yogesh Yadav, serial entrepreneur and North India distributor for Wagner India, who underlined the importance of innovation, sustainability, and efficiency in the coatings sector. His words set the tone for an engaging program of technical sessions and discussions.

Mr. Amar Koppa, Director & Country Manager of J. Wagner India, highlighted Wagner's journey in India and its mission to strengthen coating technologies across the market. He was followed by Mr. T. R. Ashwin, Technical Service Head of AkzoNobel India, who spoke on next-generation powder coatings with advanced durability. From the global stage, Mr. Hubert Sum, Key Account Manager – Wheels at J. Wagner GmbH,

Germany, together with Mr. Prashant Rai, Regional Manager at J. Wagner India, presented Wagner's C-Line Solutions designed specifically for alloy wheels. Their session was complemented by Mr. Deepak Shinde, Technical Service Head of J. Wagner India, who shared insights on powder coating innovations for 2W and 4W alloy wheels. Adding to the dialogue, Mr. Janinder Singh, Business Development Head at AkzoNobel India, addressed the growing significance of sustainable coating technologies and their impact on future industry practices.

A special highlight of the evening came when Ms. Kanish Malhotra, Editor of Industrial Front | PaintVision, unveiled the 3rd Edition of the PaintVision Powder Coatings Conclave, to be held in Delhi. She announced that this year's conclave will be bigger, bolder, and more impactful than ever

before, with over 100 user and applicator companies from diverse sectors. She emphasized that the conclave will not just be a networking platform but a knowledge-

driven experience, featuring technical sessions, workshops, and critical discussions on sustainability and efficiency.

The day concluded with a panel discussion that brought experts, manufacturers, and applicators together to share perspectives on the future of powder coatings for alloy wheels.

The dialogue was lively and insightful, covering challenges, opportunities, and solutions to strengthen India's powder coating ecosystem.

With its strong mix of technical expertise, practical insights, and future-focused conversations, the Wagner conference marked a significant step forward for the coatings industry. The event reinforced Wagner's role as both a technology leader and a knowledge partner, setting the stage for continued innovation in alloy wheel finishing across India.

MSME

India's Digital Infrastructure Drives MSME Growth with ₹2.8 Lakh Crore Revenue Impact

India's Micro, Small, and Medium Enterprises (MSME) sector has leveraged digital infrastructure to achieve remarkable growth, with collective revenue increasing by 34% to ₹2.8 lakh crore in the first half of 2025, according to the latest MSME Ministry data.

The digital transformation has enabled 4.2 crore MSMEs to access formal credit channels, with total lending to the sector reaching ₹18.5 lakh crore. This represents a 45% increase from the previous year and demonstrates the sector's growing integration with the formal economy.

Digital Payment Revolution:

The Unified Payments Interface (UPI) has revolutionized MSME operations, with transaction volumes reaching 12.5 billion monthly transactions worth ₹18.2 lakh crore. Small businesses have particularly benefited from reduced transaction costs and improved cash flow management.

Digital lending platforms have disbursed ₹3.4 lakh crore to MSMEs through AI-driven assessment models, reducing approval time from weeks to hours. The Reserve Bank of India's digital lending guidelines have ensured responsible growth while maintaining financial.

stability Sector-wise Performance Analysis:

Manufacturing MSMEs have shown exceptional growth with a 38% increase in production output. The textile and garment sector leads with 2.2 lakh units reporting increased capacity utilization. Food processing MSMEs have expanded significantly, with 1.8 lakh units now certified under food safety standards. Service sector MSMEs, particularly in IT and professional services, have grown by 42% in revenue terms. The rise of remote work has enabled small IT companies

to serve global clients, contributing ₹85,000 crore to export earnings..

Export Performance and Global Integration:

MSME exports have reached $1The PM SVANidhi scheme has digitally onboarded 52 lakh street vendors, providing them with access to formal credit and digital payment systems. The scheme has disbursed ₹8,200 crore in loans with a remarkable 96% repayment rate.

Challenges and Support Measures:

Despite growth, MSMEs face challenges in skilled labor availability and raw material price volatility. The government has announced a ₹15,000 crore skill development package specifically for MSME workers, targeting 25 lakh beneficiaries over two years.

The Emergency Credit Line GuaranteeScheme (ECLGS) has been extended with an additional corpus of ₹50,000 crore to support MSMEs affected by global supply chain disruptions. This support ensures continued growth momentum in the sector.

85 billion in the first eight months of 2025, representing 48% of India's total merchandise exports. The Government e-Marketplace (GeM) has facilitated ₹2.2 lakh crore in procurement from MSMEs, ensuring steady demand for small businesses.The One District One Product (ODOP) initiative has created brand recognition for 728 unique products across districts, with 45 products receiving geographical indication (GI) tags. This branding effort has increased average selling prices by 25% for participating MSMEs.

Technology Adoption and Innovation:

Artificial Intelligence and Machine Learning adoption among MSMEs has increased by 280%, with 85,000 units implementing AI-driven solutions for inventory management, customer service, and quality control. This technological upgrade has improved productivity by an average of 22%.The PM SVANidhi scheme has digitally onboarded 52 lakh street vendors, providing them with access to formal credit and digital payment systems. The scheme has disbursed ₹8,200 crore in loans with a remarkable 96% repayment rate.

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MSMEs Called to Co-Create Resilience with Data Power

Government urges private-sector insights to shape agile, disruption-proof MSME policy.

At a PHD Chamber of Commerce and Industry (PHDCCI) forum in New Delhi, Joint Secretary of the Ministry of MSME, Ateesh Kumar Singh, urged India's micro, small and medium enterprises (MSMEs) to actively share real-time data with the government. He stressed that accurate industry insights can help policymakers design agile, disruption-proof strategies for the sector.

Singh highlighted that MSMEs, which contribute nearly one-third of India's GDP and employ over 110 million people, remain vulnerable to supply chain disruptions, global volatility, and rapid technological shifts. The pandemic underscored these weaknesses, revealing how a lack of timely data hampered both preparedness and recovery. According to Singh, data from entrepreneurs—whether related to credit flow hurdles, logistics costs, or barriers to adopting green and digital technologies—can directly inform government schemes. Such inputs will allow policies to becomeproactive instead of reactive. Industry leaders at the forum echoed this sentiment, agreeing that collaboration can prevent duplication of efforts and ensure resources are used more effectively.He further noted that India's ambitions to become a global manufacturing hubdepend on the competitiveness of its MSMEs. With global supply chains being restructured, Indian enterprises have a chance to step up, but seizing that opportunity requires resilience and agility. Accurate, real-time data, Singh emphasized, is the bridge between challenges and solutions.

The forum also discussed how digital platforms could expand market access, how sustainable practices could align MSMEs with global compliance and how skilling initiatives could be tailored to industry clusters. By pooling insights, MSMEs can strengthen not just their survival against disruptions but also their innovation for future growth. The message was clear: policymaking can no longer be a one-way street. Government and industry must co-create, with resilience built on the foundation of shared responsibility and real numbers.

UP International Trade Show 2025 to Spotlight Russia Partnership

Greater Noida event to showcase MSMEs, handicrafts, and global buyers

Greater Noida, 9 Sept — The UP International Trade Show (UPITS-2025) is set to open on 25 September with Russia as the official partner country. Prime Minister Modi will inaugurate the event, which will host 2,500 exhibitors and attract 500+ foreign buyers.

The trade show will cover IT, MSMEs, agriculture, handicrafts, and food processing. Organizers said the platform will provide global visibility for Indian MSMEs, enabling them to tap export markets more effectively.The event will also feature knowledge sessions on e-commerce, insurance, and youth entrepreneurship, alongside cultural showcases celebrating Uttar Pradesh's heritage.

"UP is positioning itself as a trillion-dollar economy, and UPITS is central to that ambition," a state official remarked.

Next-Gen GST Reforms to Spur Electronics Demand, Boost Localisation and Jobs

Synopsis: The Government of India has announced next-gen GST reforms aimed at boosting the electronics and ICT hardware ecosystem. Rate cuts on air conditioners, TVs, monitors, projectors, power banks, renewable energy devices and composting machines are expected to make products more affordable, spur domestic demand, support MSMEs and startups, create jobs, and strengthen India's position in global value chains New Delhi, September 9:The Government's latest round of Goods and Services Tax (GST) reforms is set to provide a strong push to India's electronics and ICT hardware ecosystem, with rate cuts aimed at driving affordability, expanding domestic demand and strengthening local value chains.Under the new framework, GST on air conditioners, dishwashers and large-screen LCD/LED televisions has been slashed from 28% to 18%. Industry observers say this will not only make these products more accessible for households but also expand backward linkages in compressors, displays, wiring, semiconductors and assembly services — opening up fresh opportunities for MSMEs and households but also expand backward linkages in compressors, displays, wiring, semiconductors and assembly services — opening up fresh opportunities for MSMEs and component manufacturers. Similarly, the reduction of GST on monitors and projectors (non-TV) from 28% to 18% is expected to benefit schools, offices and digital learning centres. Power banks and other non-Li-ion accumulators will also become cheaper as tax rates fall from 28% to 18%, supporting India's digital adoption and energy backup needs. In a boost to security forces, GST on two-way radios has been lowered from 12% to 5%, cutting procurement costs for police, paramilitary and defence. Renewable energy players will also gain as GST on solar PV cells and renewable energy devices has been reduced from 12% to 5%, while composting machines will now attract just 5% GST.Officials said the reforms are designed to reinforce Digital India and Aatmanirbhar Bharat, while promoting localisation, reducing import dependence and creating new jobs across electronics manufacturing. By stimulating demand and enabling cost competitiveness, the tax cuts are expected to deepen India's role in global electronics value chains.

India Accelerates Green Hydrogen Push with FirstR&D Conference and ₹100 Crore Innovation Fund

Synopsis: Union Minister Pralhad Joshi launches start-up call for proposals, highlights rapid R&D progress under the National Green Hydrogen Mission, and sets the stage for India's emergence as a global hub in clean energy.

India's ambitious green hydrogen journey took another decisive step forward with the inauguration of the country's first Green Hydrogen R&D Conference. Union Minister of New and Renewable Energy, Pralhad Joshi, opened the two-day event, underscoring the government's commitment to building a full-fledged hydrogen economy and unveiling a ₹100 crore Call for Proposals aimed at start-ups working on breakthrough hydrogen technologies.

The new scheme provides up to ₹5 crore per project, targeting innovation in hydrogen production, storage, transport and utilisation. At the conference, 25 start-ups showcased innovations ranging from electrolyser manufacturing to AI-powered optimisation and biological hydrogen solutions — signalling the diverse opportunities opening up in this emerging sector.

R&D Progress Under NGHM

The Minister detailed the progress of the National Green Hydrogen Mission (NGHM), launched in 2023 with an outlay of ₹19,744 crore. The dedicated R&D programme has already awarded 23 projects, covering safety and integration, biomass-based hydrogen, non-biomass hydrogen production, and advanced applications. The projects are being executed by IITs, IISERs, CSIR labs, and leading industry partners.

The second round of proposals, announced in July 2025, remains open, with strong global interest. More than 30 joint proposals have been submitted under the EU-India Trade and Technology Council, including projects exploring hydrogen production from waste.

From Vision to Action

Joshi stressed that India's green hydrogen ecosystem is moving rapidly from policy vision to real-world projects. Among the highlights:

- **Ports:** India's first port-based green hydrogen pilot project at V.O. Chidambaranar Port in Tamil Nadu is underway.
- **Steel:** Five pilot projects are testing hydrogen-based decarbonisation in steelmaking.
- **Shipping:** Vessels are being retrofitted and refuelling infrastructure is coming up at Tuticorin Port.
- **Transport:** Hydrogen buses and refuelling stations are already operational.
- **Fertilisers:** India's first-ever green ammonia auction discovered a historic low price of ₹49.75 per kg — down from over ₹100 last year — with supplies due to start at Paradeep Phosphates.

Building the Ecosystem

The conference also highlighted enabling frameworks that have been put in place. These include a national Green Hydrogen Standard and Certification Scheme aligned with 140 global standards, sanctioning of five testing facilities, and certification of over 5,600 trainees in hydrogen-related skills.

The government has granted regulatory waivers such as transmission charge exemptions and faster clearances, while dedicated hydrogen hubs are being developed at Kandla, Paradip, and Tuticorin ports. Large corporations like NTPC, Reliance and IOCL are investing heavily, alongside start-ups and MSMEs, to create a robust domestic hydrogen value chain.

A Global Opportunity

India's green hydrogen targets remain bold: five million metric tonnes of production annually by

2030, supported by 125 GW of renewable capacity, ₹8 lakh crore in investments, six lakh jobs, and a 50-million-tonne annual cut in CO_2 emissions.

Principal Scientific Adviser Ajay Kumar Sood told the gathering that "R&D is not optional but essential," noting that sustained innovation will determine India's leadership in this field. MNRE Secretary Santosh Kumar Sarangi added that the Green Hydrogen R&D programme has a budget of ₹400 crore, and the ministry stands ready to support stakeholders in driving the mission forward.

Mission Director Dr. Abhay Bhakre concluded that India is standing at the threshold of becoming a global leader in green hydrogen, with innovation, collaboration, and policy alignment all pointing towards rapid scale-up.

With its mix of start-up energy, industrial investment and government backing, the sector is moving decisively from concept to execution. The first Green Hydrogen R&D Conference has set the tone: India is positioning itself not just as a participant, but as a leader in the global clean hydrogen race.

Next-Generation GST Reforms Give India's Textile Sector a Major Boost

"Synopsis": Rationalisation of GST rates removes long-standing distortions, lowers costs, boosts demand, supports exports, and strengthens India's bid to become a global textile powerhouse.

India's textile and apparel industry has received a significant policy boost with the latest round of Goods and Services Tax rationalisation, hailed by industry associations as one of the most impactful changes in recent years. The reforms, introduced under the government's Next-Generation GST framework, promise to cut production costs, revive consumer demand, support exports, and enhance the sector's global competitiveness.

The measures directly address issues that have long constrained the sector — particularly the inverted duty structure that imposed higher taxes on raw materials than on finished goods. By correcting these distortions, the new GST rates make Indian textiles more affordable in domestic markets and more competitive abroad.

Strengthening the Textile Value Chain

The rationalisation ensures that benefits are felt across the entire value chain, from fibre to fashion. Lower GST on man-made fibres and yarns levels the playing field with cotton, helping India pursue its fibre-neutral policy and encouraging balanced growth. For garments, a higher exemption threshold makes affordable apparel even cheaper, particularly benefiting middle- and low-income households in Tier-2 and Tier-3 towns.

Industry insiders say this change could be transformative for garment makers, many of whom have faced tight margins due to cheap imports and rising costs. The reform not only supports domestic brands but also bolsters employment in labour-intensive activities such as stitching, tailoring, and finishing — jobs that are critical for women and youth across textile clusters.

Key GST Adjustments at a Glance

- **Readymade Garments & Made-ups:** GST at 5% up to ₹2,500 per piece (earlier limit ₹1,000), making affordable apparel more accessible.
- **Man-Made Fibres & Yarns:** Rates cut from 18%→5% for fibres and 12%→5% for yarns, resolving the inverted duty structure and easing working capital pressure for small and medium producers.
- **Carpets & Floor Coverings:** GST reduced from 12% to 5%, boosting export competitiveness for traditional clusters like Bhadohi and Srinagar.
- **Handicrafts & Handlooms:** 36 handicraft items, cotton rugs, and handwoven carpets see GST lowered to 5%, offering direct relief to artisans and strengthening India's cultural heritage.
- **Sewing Machines:** Both domestic and industrial machines brought down from 12% to 5%, reducing costs for tailoring units and promoting local manufacturing.

Complementary Measures

The reforms are backed by procedural simplifications designed to reduce friction for smaller businesses. Refunds for zero-rated supplies and inverted duty structures are to be processed through a system-driven risk evaluation, promising faster clearances. In addition, the removal of the ₹1,000 threshold for small consignments by courier or post makes it easier for exporters, particularly SMEs and artisan collectives, to sell directly to global buyers.

Two new simplified registration schemes — one for small, low-risk businesses and another for suppliers working through e-commerce operators — aim to cut red tape and bring more participants into the formal system without overwhelming them with compliance.

Industry Reactions and Global Competitiveness

The response from textile players has been overwhelmingly positive. Manufacturers, exporters, and artisan groups have described the reforms as both timely and strategic, aligning perfectly with the Prime Minister's "5F" formula: **Farm to Fibre to Factory to Fashion to Foreign**. By lowering costs at each stage and stimulating demand, the new GST framework is expected to stimulate domestic consumption and accelerate exports.

With global buyers increasingly diversifying supply chains, India's improved cost structure and streamlined compliance environment could position the country as a more attractive sourcing hub. Analysts suggest that this could help India move closer to its ambitious goal of building a USD 350 billion textile and apparel market by 2030.

A Balanced Vision: Heritage and Growth

Beyond economics, the reforms reflect a broader philosophy: "Virasat Bhi, Vikas Bhi" — preserving India's rich textile heritage while modernising its industrial base. By extending relief to handicrafts and handlooms alongside man-made fibres and apparel, the policy balances tradition with global market aspirations.

If effectively implemented, the Next-Generation GST reforms could reshape India's textiles landscape. From powering small artisans to strengthening large export-oriented units, the new framework provides a unified push towards making India a true global textile powerhouse.

Wholesale Prices Edge Up Slightly in August Amid Rising Food and Manufactured Goods Costs

Synopsis: India's Wholesale Price Index (WPI) rose by 0.52% year-on-year in August 2025, driven largely by food products, non-metal mineral goods and transport equipment, while primary articles and fuel prices eased.

India's annual wholesale inflation rate — as measured by the All-India Wholesale Price Index — stood at 0.52% in August 2025, according to the latest provisional data released by the Ministry of Commerce & Industry. The increase marks a modest rebound after earlier months of price containment, and reflects nuanced shifts in India's supply-chain and production landscape.

A closer look at the sectoral breakdown shows that manufactured goods drove the increase, with inflation in that segment up 2.55% year-on-year. Among the manufactured items seeing price increases were other non-metallic mineral products, miscellaneous transport equipment and machinery, and food-product manufacturing. In contrast, the WPI for primary articles — a category that includes agricultural and mineral outputs — declined by 2.10% annually, signaling easing input-cost pressures in raw materials.

Month-on-month, prices also moved upward; the WPI rose 0.52% from July to August. Primary articles recorded the strongest uptick, with non-food articles and minerals showing increases of 2.92% and 2.66% respectively. Meanwhile, the fuel and power index fell 0.69% sequentially, led largely by a decline in electricity prices. The food price sub-index also showed modest gains in August, up 0.21%, driven by increases in milk and some agricultural products. Within manufactured goods, inflation pressures were broad but uneven, with sectors such as textiles and electrical equipment seeing upward pressure, while areas like basic metals and computer/electronic products saw more stable or even declining prices.

Economists and industry watchers welcomed the relatively mild inflation, noting that rising manufacturing-sector prices might squeeze margins but are not yet triggering systemic inflation risks. The moderation in primary article prices — which often flow through to consumer goods and services — offers some room for monetary policy flexibility, contingent on domestic demand and supply-chain developments in the coming months.

Overall, the August WPI data suggest that India's inflation dynamics are continuing their slow recalibration as supply-side pressures ease in raw materials, while output prices are absorbing a mix of input cost increases and demand recovery. Policymakers will likely keep a close watch on how these price movements translate downstream to consumers and businesses.

Pharma Department Prepares for Special Campaign 5.0, Aims at Clean Governance and Efficiency

"Synopsis": The Department of Pharmaceuticals has launched preparations for Special Campaign 5.0, running through October 2025, to focus on swachhata, digitization, transparency, efficiency

and public service delivery. Past campaigns e across PSUs and institutes. have reviewed over 41,000 files, cleaned 17,000+ sites, and reclaimed office spac The Department of Pharmaceuticals, under the Ministry of Chemicals and Fertilizers, has begun preparations for the Special Campaign for Disposal of Pending Matters (SCDPM) 5.0. Scheduled from October 2 to 31, the campaign will target pending issues across governance while prioritizing cleanliness, transparency, digitization, efficiency, and service delivery. As per guidelines from the Department of Administrative Reforms and Public Grievances (DARPG), targets for SCDPM 5.0 will be finalized by September 25, with all attached offices, autonomous bodies, PSUs, and societies instructed to ensure active participation.

Since its inception in 2021, the campaign has delivered measurable outcomes. More than 41,000 files have been reviewed, over 17,000 sites cleaned, and nearly ₹4.8 lakh generated from scrap disposal. Key highlights include:

- **SCDPM 1.0 (2021):** Introduced digitization; over 8,000 files reviewed.
- **SCDPM 2.0 (2022):** Jan Aushadhi Kendras joined; 6,400+ files cleared.
- **SCDPM 3.0 (2023):** Expanded cleanliness drives; ₹3.41 lakh earned via scrap disposal.
- **SCDPM 4.0 (2024):** Achieved 100% digitization; HAL, Pune reclaimed 12,934 sq. ft. of office space.

Best practices have emerged from institutions like NIPER-SAS Nagar, which reclaimed office space and documented transformations through photographic evidence.

With SCDPM 5.0, the Department of Pharmaceuticals is looking to sustain momentum, setting new benchmarks for efficiency, accountability, and citizen-centric service.

Trade & Economy

Industrial Front
EMPOWERS THE INDIAN INDUSTRIES

Job Growth Slashed by Nearly a Million, Raising Labor Market Worries

BLS Revision Reveals Weaker Employment Trends Than Previously Reported

The US Bureau of Labor Statistics (BLS) has revised its employment figures downward, cutting 911,000 jobs from previously reported data. This major correction, among the largest in recent years, signals that the labor market may be weaker than previously believed, sparking concern among economists, policymakers, and investors.

The revision comes from the BLS's annual benchmarking process, which compares monthly survey data with more complete tax records. Industries like retail and hospitality, once thought to be fueling a strong post-pandemic recovery, now show slower hiring than initially reported. While no jobs vanished overnight, the adjustment highlights slower employment growth, which could affect wages, consumer confidence, and overall economic momentum. Policy implications are significant. The Federal Reserve, which uses job data to guide interest rates, may now reassess its approach. Slower labor growth could encourage earlier easing of rates, balancing inflation control with support for economic growth.

The correction also raises questions about the reliability of official labor data. Investors, businesses, and lawmakers who rely heavily on BLS figures may increasingly turn to alternative real-time indicators to gauge the true state of the job market.

Despite the downward revision, the US labor market is not collapsing. Jobs are still available, but the foundation is more fragile. Job seekers may face tougher competition, and companies might hesitate to expand hiring. With inflation, global uncertainties, and high borrowing costs already challenging growth, the labor market's resilience has narrowed, underscoring the need for cautious optimism.

RBI Holds Repo Rate at 4.25%, Signals Confidence Amid Economic Recovery

The Reserve Bank of India (RBI) has kept the repo rate unchanged at 4.25% in its latest bi-monthly review, marking the fifth consecutive session without a change. RBI Governor emphasized a "balanced approach," noting that inflation remains within the target range while global economic uncertainties require careful monitoring.

The domestic economy is showing resilient growth, but it is prudent to maintain our stance to ensure broad-based and sustainable development," the Governor said during the post-announcement press briefing.

The decision reflects the central bank's confidence in India's current economic stability while supporting on going recovery without fuelling inflationary pressures. Investors responded positively, with the Sensex and Nifty rising by 0.8% immediately after the announcement, signaling approval of the consistent policy environment.

Alongside the RBI decision, the government has launched the ₹15,000 crore Agri-Infra Fund – Phase II and is fast-tracking development in 50 Smart Cities. These initiatives are expected to strengthen infrastructure, boost employment, and further enhance market sentiment.Overall, the RBI's steady policy, combined with government initiatives, suggests cautious optimism about India's growth trajectory while keeping a watchful eye on inflation and global challenges.

Indian Economy Shows Resilience with 7.4% Q4 Growth

India's economy continues to demonstrate remarkable resilience, posting a 7.4% growth rate in the final quarter of FY25, with full-year GDP growth standing at a solid 6.5%. The growth was primarily driven by private consumption and renewed industrial investment, signaling a positive shift after periods of global economic turbulence.

The government's continued infrastructure push and public capital expenditure programs have played a central role. Sectors such as construction, transport, and manufacturing witnessed healthy expansion. Meanwhile, exports grew by 6.3% year-on-year, highlighting a rebound in external demand.

Finance Minister Nirmala Sitharaman lauded the figures, stating, "This performance reflects the inherent strength of our economic fundamentals. We are poised to emerge stronger, with greater employment and higher income levels."

However, economists urge caution, pointing to inflationary pressures and global uncertainties. With interest rates expected to stay firm due to global monetary tightening, maintaining momentum will require prudent fiscal management. Still, the current trajectory places India among the fastest-growing major economies, reaffirming its position as a global investment hotspot.

Inflation Rebounds to 2.1% After Months of Decline

Food and gold prices drive the uptick; RBI faces balancing act

India's retail inflation has edged higher after a prolonged nine-month decline, raising eyebrows among policymakers and economists alike. According to provisional data, the Consumer Price Index (CPI) rose to 2.1% in August, up from 1.55% in July.

This increase, though modest, comes after months of unusually low inflation largely driven by base effects. Economists attribute the uptick to rising food and commodity costs. Prices of vegetables and pulses firmed up in August, while international gold prices surged over 5%, adding weight to core inflation. input costs could dictate the trajectory going forward."While current numbers look benign, early signs of food-driven price pressure cannot be ignored," noted a Mumbai-based economist. "The RBI may hold its stance for now but will tread carefully."

For households, the uptick is already being felt in kitchen budgets. A vendor at Delhi's Azadpur Mandi remarked that wholesale onion and tomato prices have climbed by 15–20% in recent weeks. Global cues also matter. Energy price volatility and tariff uncertainties, particularly after the U.S. raised duties on Indian goods, could filter through to domestic inflation.

The final CPI figures, due later this week, will be key in shaping the RBI's monetary policy review. The consensus expectation is that the central bank will prioritize growth stability, while keeping a close watch on inflation signals from food and global commodities. Despite the rise, inflation still sits comfortably below the Reserve Bank of India's 4% target, offering the central bank some breathing room. Analysts, however, caution that rural consumption trends and

GST Overhaul Targets Festive Demand Boost

Rates simplified; luxury items taxed higher, essentials exempted

New Delhi, 9 Sept — The government has cleared a major GST revamp, simplifying rates to two key slabs of 5% and 18%. Health insurance has been exempted, while luxury cars, premium air travel, and tobacco products will attract a steep 40% tax.

The changes, expected to cost the exchequer around ₹47,700 crore, are aimed at stimulating demand during the upcoming festive season. Officials said the new structure would make compliance easier for businesses and provide relief for households.

Economists believe the reform is a step toward greater tax clarity but warn that high-end consumption may take a hit. Still, the middle-class benefit is expected to translate into stronger sales in FMCG, electronics, and daily-use categories.

Modi's GST Reform Boosts Market Confidence Despite Fiscal Concerns

Prime Minister Narendra Modi has announced a sweeping overhaul of India's Goods and Services Tax (GST) regime, marking a pivotal moment in the country's fiscal reform journey. The changes include the elimination of the controversial 28% tax slab and a reduction in the 12% category to 5% for a wide range of consumer products. The reforms, which are expected to cost the government ₹20,000 crore annually in foregone revenue, aim to simplify compliance and increase consumer demand.

While economists express concern about the fiscal impact, the reform has been positively received by businesses and consumers alike. "This is a bold political move, and it will certainly boost consumption," said Ritu Mehra, a policy analyst at the Indian Institute of Finance. "More importantly, it streamlines tax compliance for small and medium enterprises."The reforms come at a critical juncture, just months before key state elections. Political analysts view it as a strategic maneuver to reaffirm the government's pro-business credentials. Simultaneously, the move could boost GDP by an estimated 0.6%, according to a report by Credit Suisse. Stock markets responded enthusiastically, with the Nifty and Sensex opening higher and the rupee gaining against the dollar. This sentiment was bolstered by declining global oil prices, offering additional macroeconomic stability.Overall, the GST overhaul reflects the government's dual objective: to reinvigorate the economy ahead of political contests and to set the stage for a broader economic transformation in the run-up to the 2026 Budget.

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India's Renewable Energy Sector Achieves 180 GW Milestone, Attracts $45 Billion Investment

India has crossed the significant milestone of 180 GW renewable energy capacity, solidifying its position as the world's third-largest renewable energy market. The achievement comes with unprecedented private sector investment of $45 billion committed for the next three years.

The Ministry of New and Renewable Energy announced that solar power contributes 78 GW, wind energy accounts for 72 GW, and other renewable sources including hydro and biomass make up the remaining 30 GW. This capacity addition has created 1.2 million direct jobs and 3.5 million indirect employment opportunities.

- ***Investment Landscape and Corporate Participation:***

Major corporate groups have announced substantial renewable energy investments. Adani Green Energy has committed $25 billion for 50 GW capacity addition by 2027, while Tata Power plans $12 billion investment for 35 GW renewable capacity expansion.

International investors have shown strong confidence in India's renewable sector. The Canada Pension Plan Investment Board has invested $2.8 billion in Indian renewable assets, while Norway's sovereign wealth fund has allocated $3.2 billion for solar and wind projects.

- ***Manufacturing Ecosystem Development:***

The solar manufacturing sector has witnessed remarkable growth with domestic production capacity reaching 15 GW for solar cells and 25 GW for solar modules. The Approved List of Models and Manufacturers (ALMM) has promoted quality domestic manufacturing while reducing import dependency.

Wind turbine manufacturing has expanded significantly with 12 global manufacturers establishing production facilities in India. The sector now produces 85% of wind turbines domestically, contributing to cost reduction and supply chain security.

- ***Grid Integration and Storage Solutions:***

The renewable energy integration challenge is being addressed through massive grid infrastructure development. The Green Energy Corridors project has commissioned 9,700 km of transmission lines specifically for renewable energy evacuation.

Battery Energy Storage Systems (BESS) deployment has accelerated with 8.5 GW of grid-scale storage commissioned. The declining battery costs, now at $120 per kWh, have made storage economically viable for grid balancing and peak power management.

- ***Economic Impact and Cost Competitiveness:***

Renewable energy tariffs have reached grid parity with conventional sources, with solar power tariffs averaging ₹2.45 per unit and wind power at ₹2.65 per unit. This cost competitiveness has driven industrial demand, with 450 corporations signing renewable energy purchase agreements.

The sector has contributed ₹4.8 lakh crore to the economy througdirect h investments, component manufacturing, and service provision. State governments have earned ₹15,000 crore in additional revenue through land lease fees and local taxes.

- ***Global Leadership and Climate Commitments:***

India's renewable energy success has strengthened its position in international climate negotiations. The country is ahead of schedule in meeting its Paris Agreement commitments and has voluntarily increased its 2030 renewable energy target to 500 GW.

The International Solar Alliance, headquartered in India, has mobilized $62 billion in solar investments across 109 member countries. This leadership role has positioned India as a key player in global clean energy diplomacy.

- ***Future Roadmap and Emerging Technologies:***

The government has announced plans for 50 GW of green hydrogen production capacity by 2030, requiring an additional 125 GW of renewable energy. This ambitious target has attracted international partnerships with Germany, Japan, and Australia for technology transfer and investment.

Floating solar projects totaling 10 GW are under development, utilizing India's vast water body resources. These projects will conserve land while reducing water evaporation, providing dual environmental benefits.

India's Agricultural Exports Reach $58 Billion Record High, Digital Technology Transforms Farming

India's agricultural sector has achieved a historic milestone with exports reaching $58.2 billion in the first eight months of 2025, representing a 24% increase from the previous year. This success is driven by digital technology adoption, improved supply chain efficiency, and strategic market diversification.

The Ministry of Agriculture and Farmers Welfare reported that 15.2 crore farmers have adopted digital farming technologies, resulting in 18% average yield improvement and 25% reduction in input costs. The integration of artificial intelligence, IoT sensors, and satellite imaging has revolutionized traditional farming practices.

- ***Technology Adoption and Precision Agriculture:***

Digital agriculture platforms have onboarded 8.5 crore farmers, providing real-time weather information, soil health data, and crop advisory services. The government's Digital Agriculture Mission has deployed 2.2 lakh weather stations and 850,000 soil health monitoring devices across farming regions.

Drone technology adoption has accelerated with 45,000 drones operational for crop monitoring, pesticide spraying, and yield estimation. The cost of drone services has decreased by 60%, making precision agriculture accessible to small and marginal farmers.

- ***Supply Chain Revolution and Cold Storage Expansion:***

The agricultural supply chain has been transformed through digital platforms connecting farmers directly to markets. The e-NAM (electronic National Agriculture Market) platform has facilitated trades worth ₹1.8 lakh crore, ensuring better price realization for farmers.

Cold storage capacity has expanded by 35% to 45.2 million tonnes, reducing post-harvest losses from 16% to 8.5%. The Pradhan Mantri Kisan Sampada Yojana has approved 485 new food processing projects with ₹12,500 crore investment.

- ***Export Performance and Market Diversification:***

Rice exports have reached $8.2 billion, accounting for 14% of total agricultural exports. India has emerged as the leading rice exporter globally, supplying to 140 countries. The focus on quality improvement and organic certification has commanded premium prices in international markets.

Spice exports have grown by 32% to $4.8 billion, with India maintaining its position as the world's largest spice producer and exporter. Value-added spice products have contributed significantly to export growth and higher profit margins.

- ***Sustainable Agriculture and Organic Farming:***

Organic farming area has expanded to 4.2 million hectares, with 1.8 million farmers certified under organic standards. Organic exports have reached $1.2 billion, with strong demand from European and North American markets.

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The Zero Budget Natural Farming initiative has been adopted by 2.2 million farmers across 18 states, reducing input costs by 40% while maintaining yield levels. This sustainable approach has improved soil health and farmer incomes simultaneously.

- ***Financial Inclusion and Credit Access:***

The Kisan Credit Card scheme has disbursed ₹2.8 lakh crore to 7.2 crore farmers, ensuring timely access to agricultural credit. Digital KCC applications have reduced processing time from 15 days to 3 days.

Farmer Producer Organizations (FPOs) have grown to 12,500 units with 85 lakh farmer members. These FPOs have accessed ₹45,000 crore in institutional credit and achieved ₹68,000 crore in collective business turnover.

- ***Climate Resilience and Water Management:***

Climate-resilient crop varieties have been adopted across 45 million hectares, helping farmers adapt to changing weather patterns. The development of 280 drought-resistant and flood-tolerant varieties has ensured stable production despite climate challenges.

Micro-irrigation coverage has expanded to 12.8 million hectares through the Pradhan Mantri Krishi Sinchayee Yojana. This expansion has improved water use efficiency by 35% and increased crop productivity in water-stressed regions.

- ***Global Recognition and Future Prospects:***

India's agricultural transformation has received international recognition with FAO acknowledging the country's achievement in digital agriculture adoption. The World Bank has approved $2.8 billion in additional funding for agricultural modernization projects.

he sector is projected to achieve $75 billion in exports by 2026, supported by continued technology adoption, infrastructure development, and market expansion. The focus on value addition and processing will further enhance farmer incomes and export competitiveness.

These developments position India's agricultural sector as a global leader in sustainable farming practices and technology adoption, ensuring food security while contributing significantly to economic growth.These five comprehensive news articles cover the latest developments across key industrial sectors for Industrial Front India, providing in-depth analysis of current economic trends, technological advancements, and growth opportunities in the Indian economy.

India's Natural Farming Mission Set to Launch

India is embarking on a transformative journey to promote sustainable agriculture through its upcoming National Mission on Natural Farming. Set to launch officially on August 23, the initiative was first introduced by Prime Minister Narendra Modi in 2021 and has since gathered momentum. With a significant allocation of ₹2,481 crore, the mission is expected to benefit over 10 million farmers and cover 750,000 hectares of land.

Natural farming practices advocate minimal use of chemicals, emphasizing instead on bio-inputs such as cow dung, cow urine, and other organic materials. The goal is to rejuvenate soil health, reduce dependency on chemical fertilizers, and improve overall agricultural sustainability. States such as Gujarat, Himachal Pradesh, and Andhra Pradesh have already piloted successful models that are now being scaled nationwide.A major component of the mission includes capacity-building initiatives and training programs to educate farmers about natural farming techniques. Government officials note that farmer field schools and demonstration plots will be critical in promoting hands-on learning. Additionally, efforts are underway to integrate traditional knowledge with scientific advancements, empowering farmers with both heritage and innovation.

This shift towards natural farming is also economically strategic. Rising input costs have placed heavy financial burdens on smallholder farmers. By minimizing external input dependency, natural farming promises cost savings and increased profitability. Environmental benefits include reduced water consumption, better biodiversity, and lower greenhouse gas emissions.

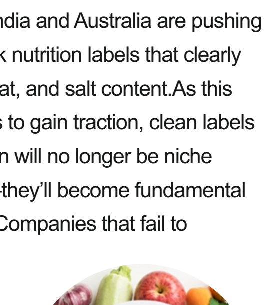
The mission has gained support from several agricultural experts, environmentalists, and policy think tanks. However, there are also concerns regarding the scalability and yield stability of natural farming, especially for high-demand crops. The government has assured it will monitor progress closely and provide performance-linked incentives.As India strives to lead the global movement toward greener food production, the success of this mission could set a precedent for other developing nations seeking to balance food security with ecological integrity.

Consumers Seek Cleaner Labels, More Protein

As global awareness around health and wellness continues to rise, consumers are becoming increasingly conscious of the food they consume. A significant trend that has emerged in the food industry is the growing demand for clean labels—products with fewer ingredients, minimal processing, and transparent sourcing information. Shoppers are scrutinizing product labels more than ever, seeking reassurance that what they're eating is free from artificial additives, preservatives, and genetically modified organisms.

A variety of protein-rich foods and clean-label products displayed on a wooden countertop in a home kitchen. The items include grilled chicken, salmon, quinoa, eggs, peanut butter, yogurt, and various packaged goods with simple ingredients. The setting is a relatable domestic environment with warm, natural lighting.This shift in consumer behavior is also driving the rise of high-protein diets. From fitness enthusiasts to aging populations focused on muscle retention, people are prioritizing protein-rich foods in their daily intake. Plant-based proteins, in particular, are enjoying widespread popularity due to ethical, environmental, and dietary considerations. Leading food manufacturers are rapidly adapting, investing in cleaner formulations, and creating protein-enriched alternatives to traditional snacks and meals.Global food companies like Nestlé, Danone, and Unilever are reformulating legacy products and launching new clean-label lines to cater to this growing market. Meanwhile, startups are thriving by focusing entirely on transparency, local sourcing, and simple ingredient lists. Technologies like blockchain are being explored to ensure traceability and authenticity in food supply chains.

Government regulations are also playing a pivotal role. The U.S. FDA and the European Food Safety Authority have tightened requirements for food labeling, while countries like India and Australia are pushing for front-of-pack nutrition labels that clearly display sugar, fat, and salt content.As this trend continues to gain traction, clean labels and high protein will no longer be niche selling points—they'll become fundamental requirements. Companies that fail to innovate and meet these evolving expectations risk losing out in a fiercely competitive market.



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Automotive Sector: Tata Motors Expands EV Lineup with New Affordable Model

Tata Motors has intensified its electric mobility push with the launch of a new budget-friendly electric hatchback, aimed at making EVs more accessible to the Indian middle-class market. Unveiled in early August 2025, the vehicle promises a range of 280–300 km on a single charge, competitive pricing, and enhanced safety features, positioning it as a strong contender in the rapidly growing entry-level EV segment.Industry analysts view this as a strategic move to capture the mass market ahead of increased competition from domestic and international players.

With government incentives and improved charging infrastructure, the demand for affordable EVs is on the rise.Tata Motors is also expanding its dealership network and fast-charging partnerships to strengthen its market dominance.The launch aligns with India's 2030 EV adoption target, underscoring the company's commitment to sustainable transportation while creating a new growth avenue in Tier-2 and Tier-3 cities where EV penetration has been limited so far.

Ethanol Blend Milestone Stirs Consumer Backlash

Mumbai: India's achievement of 20% ethanol blending in petrol—five years ahead of the 2030 target—was expected to be a triumph for the country's clean energy transition. Instead, it has ignited growing discontent among vehicle owners, especially in urban markets.

Motorists have reported lower fuel efficiency, increased engine wear, and higher maintenance bills since the rollout of E20 fuel. "I now get at least 10–15% less mileage on my daily commute, and my service centre warned about more frequent oil changes," said a Mumbai-based commuter.The ethanol blend, produced largely from sugarcane, is touted as a step towards reducing crude oil imports and cutting carbon emissions. However, industry experts point out that ethanol contains less energy than petrol, resulting in reduced mileage unless engines are optimised for higher blends.

Oil marketing companies maintain that E20 fuel meets all fuel meets all safety and performance standards, and that the mileage drop is marginal.

The government, meanwhile, is pushing automakers to introduce flex-fuel vehicles to address the performance gap.

Consumer groups are calling for better public awareness campaigns to ensure buyers understand the pros and cons of ethanol blends before adoption becomes universal.

GST 2.0 Spurs New B2B Opportunitiesin India's Auto Sector

The GST rationalisation has lowered car prices, but its impact goes far beyond consumers. Dealers, fleet buyers, financiers, and suppliers are recalibrating strategies to capture fresh demand.

The recent rollout of GST 2.0 has injected new life into the Indian automobile sector. While headlines have largely focused on consumer benefits, such as Tata Motors slashing prices by up to ₹1.55 lakh and Honda cutting up to ₹95,500 across its models, the deeper story is how this tax change is reshaping B2B dynamics.

For auto dealers, the immediate relief is lower inventory stagnation. With price cuts making cars moreattractive, footfall and enquiries have already surged by double digits in some regions. Dealers see faster turnover as a lifeline after years of demand fluctuations and high carrying costs. The festive season, traditionally a peak period for sales, is now expected to deliver record volumes.

Fleet operators — including cab aggregators, logistics providers, and leasing companies — are also big winners. Lower upfront costs improve the economics of large fleet purchases, enabling them to scale operations at reduced capital outlay. For example, a logistics company looking to expand its fleet of commercial SUVs can now do so at a much lower break-even point, improving margins and competitiveness. On the supplier side, GST 2.0 signals a production ramp-up. Component makers in Tier-1 and Tier-2 categories are preparing for higher volumes as OEMs boost output. Everything from tyres, batteries, and seats to electronic modules will see increased procurement orders. Ancillary SMEs, which form the backbone of the supply chain, are particularly optimistic as demand filters down the value chain.

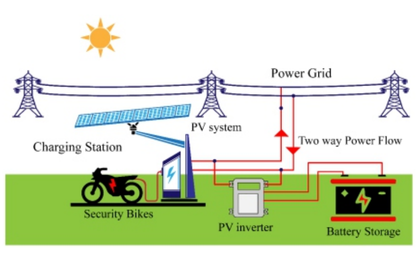
The financing ecosystem is another B2B segment seeing benefits. Auto lenders and leasing companies are redesigning loan products to capture the spike in demand Analysts believe non-banking financial companies (NBFCs) could expand market share by offering customised fleet financing solutions, which. will drive additional downstream activity in insurance, servicing, and after-sales markets.

However, the benefits will not be evenly distributed. Players with strong supply chain integration, digital dealer networks, and flexible financing arms will benefit the most. Smaller dealers or component makers who are unable to quickly scale production or manage liquidity may find themselves struggling to keep up with larger, better-capitalised competitors.

In the long run, GST 2.0 could accelerate India's journey toward becoming a more cost-competitive auto manufacturing hub. By stimulating demand at both consumer and institutional levels, the reform is creating a ripple effect that touches almost every B2B layer in the industry. From dealership groups to SMEs in auto parts, the ecosystem is gearing up for a period of robust growth.

For the first time in years, India's auto sector is experiencing a simultaneous lift across retail and business-to-business segments. The true winners will be those who can adapt quickly, form strategic alliances, and leverage this tax-driven momentum into sustainable growth.

Chandigarh Launches Solar EV Charging Pilot to Reduce Grid Pressure



The ethanol blend, produced largely from sugarcane, is touted as a step towards reducing crude oil imports and cutting carbon emissions. However, industry experts point out that ethanol contains less energy than petrol, resulting in reduced mileage unless engines are optimised for higher blends.

Oil marketing companies maintain that E20 fuel meets all safety and performance standards, and that the mileage drop is marginal. The government, meanwhile, is pushing automakers to introduce flex-fuel vehicles to address the performance gapConsumer groups are calling for better public awareness campaigns to ensure buyers understand the pros and cons of ethanol blends before adoption becomes universal. Chandigarh's ambitious EV policy targets 100% electrification of public and government transport by 2030. The solar-powered pilot is a significant step toward realizing that vision.

Experts across urban planning and clean energy sectors have praised the program, citing its potential to become a national model for climate-resilient infrastructure. As other cities look to balance mobility growth with energy efficiency, Chandigarh's bold step may light the way.

Digital Reforms to Secure India's $1 Trillion Online Economy

Government tightens payment and telecom safeguards

The Indian government has unveiled a sweeping set of reforms designed to bolster security in the digital economy, a sector expected to cross $1 trillion by 2030. Announced through a PIB release on 9 September, the measures target fraud prevention, e-commerce safety, and digital trust.

Key reforms include:

- Stricter authentication for online payments.
- Stronger monitoring of telecom operators.
- Collaboration with e-commerce firms to curb cyber fraud.
- The reforms come amid rising instances of phishing scams and payment fraud. Industry watchers say trust is the backbone of India's digital economy.

A fintech CEO commented: "Every cyber breach shakes user confidence. These reforms give both startups and consumers a stronger safety net."

With digital platforms powering MSMEs, startups, and rural commerce, analysts argue the reforms will create a level playing field. For small businesses, especially those new to online sales, government-backed security protocols could boost participation.

The move also strengthens India's positioning in global digital trade talks, particularly with the EU, where data protection is central to negotiations.

JSW Paints Acquires Akzo Nobel India in Landmark $1.6 Billion Deal

JSW Paints has acquired a 74.76% stake in Akzo Nobel India, the maker of Dulux paints, in a deal wo**Synopsis:** rth nearly $1.6 billion. The move strengthens JSW's decorative and industrial portfolio and marks one of the largest consolidations in India's paints sector.

In one of the most significant mergers in India's paints and coatings industry, **JSW Paints**, part of the diversified JSW Group, has announced the acquisition of a **74.76% controlling stake in Akzo Nobel India**, the company behind the globally recognized **Dulux** brand. The deal, valued at approximately **₹89.86 billion (US$1.6 billion)**, represents a major consolidation move that could alter the competitive landscape of the Indian paint market.

Strategic importance of the deal

This acquisition provides JSW Paints with immediate access to a premium portfolio of decorative and industrial paints, bolstering its market presence against long-time leader **Asian Paints** and recent challenger **Birla Opus**. Dulux, known for its strong brand equity and global appeal, gives JSW an edge in the premium decorative segment where consumer loyalty is strong and margins are higher.

Industry observers note that this acquisition propels JSW Paints into the league of India's top paint manufacturers almost overnight. While JSW had been expanding organically since its entry into the paint sector, the acquisition provides scale, distribution depth, and instant brand credibility.

Industry shake-up expected

The Indian paints sector, valued at around **₹75,000 crore**, is witnessing intensified competition with multiple players vying for dominance. Asian Paints has long commanded the lion's share, but the entry of heavyweights like JSW and Birla has disrupted the status quo. The Akzo Nobel acquisition positions JSW as a formidable contender, capable of challenging the duopoly that Asian Paints and Berger Paints and Berger Paints once enjoyed.

Experts predict that this could trigger a wave of **price competition, expanded dealer incentives, and aggressive marketing campaigns** as companies fight for consumer attention. The integration of Akzo Nobel's operations with JSW will be closely watched, particularly how JSW leverages Dulux's distribution network and technological expertise.

Global implications

For Akzo Nobel, the divestment is part of its global strategy to streamline operations and focus on its core European and American markets. Industry analysts suggest the move reflects multinational companies' cautious approach in high-competition markets like India, where local giants with strong dealer relationships hold significant advantages.

Challenges ahead

While the acquisition offers immense opportunities, JSW faces the challenge of integrating two distinct organizational cultures and aligning dealer networks without disrupting business continuity. Ensuring consistent product quality, maintaining Dulux's premium positioning, and expanding reach in rural India will be critical.

The bigger picture

The acquisition underscores the rising appetite for **consolidation and scale** in India's paints industry. As disposable incomes rise, consumer preferences shift toward branded and premium paints, and urban housing expands, the sector is poised for double-digit growth.

JSW's aggressive push signals that the Indian paint market is entering a new era of consolidation, competition, and innovation. With Dulux now under its umbrella, JSW is well-positioned to challenge incumbents and redefine industry dynamics in the years ahead.

Consumer Affairs Ministry to Open New Testing Labs

Ghaziabad to host EV testing and chemical analysis facilities

The Ministry of Consumer Affairs has announced the inauguration of a state-of-the-art Electric Vehicle Testing Facility and a Chemical Laboratory at the National Test House in Ghaziabad on 10 September.The EV lab will test batteries, components, and safety systems to ensure compliance with international standards, while the chemical facility will expand testing for consumer products. Officials said these upgrades are critical as EV adoption accelerates and product safety expectations rise.

Industry experts welcomed the move. "Rigorous testing infrastructure builds consumer trust, especially in emerging technologies like Evs," said an automotive analyst.

The initiative is part of the government's broader push to improve product certification and regulatory enforcement across sectors. The labs are expected to serve both domestic manufacturers and exporters.

GST Rate Cuts in Heavy Industries Set to Reshape India's Automobile and Transport Sectors

"Synopsis": The GST Council's sweeping reforms in heavy industries promise cheaper vehicles, lower logistics costs, and a strong boost for MSMEs, farmers, and the transport economy.

The recent GST rate revisions have set the stage for a major revival across India's heavy industries, particularly the automobile and transport sectors. The reforms slash tax rates across two-wheelers, cars, tractors, buses, trucks, and even auto components, creating a ripple effect that is expected to benefit not only manufacturers but also millions of small businesses, workers, and households.

For two-wheelers, the GST cut from 28% to 18% on bikes up to 350cc has been hailed as a major step for rural and semi-urban India, where motorcycles are the primary mode of transport. With lower EMIs and purchase costs, farmers, small traders, gig workers, and daily wage earners stand to benefit directly. Auto dealers and service garages also anticipate higher footfall as affordability improves.

In the passenger car segment, small cars will now attract 18% GST, down from 28%. This brings immediate relief to first-time buyers, especially in smaller towns, where compact cars dominate sales. The demand surge is expected to translate into fresh orders for ancillary industries such as tyres, batteries, and auto electronics, all of which are heavily MSME-driven.

Luxury and larger cars, too, have received a boost, with a simplified flat 40% GST and the removal of cess. Industry analysts say that while larger vehicles remain taxed at a premium, the removal of the cess will improve tax credit utilisation and make the system more transparent. This could encourage investment in the premium automobile segment, where demand has been resilient despite price barriers. Perhaps the biggest game-changer lies in the tractor and bus segments. Tractors under 1800cc will now attract just 5% GST, while larger tractors and parts have also seen steep reductions. As India is one of the world's largest tractor markets, this cut is expected to accelerate mechanisation in agriculture, boosting productivity for crops like rice and wheat. The move is also expected to strengthen India's positioning as a global tractor manufacturing hub. Buses, minibuses, and commercial vehicles have similarly benefited, with GST rates cut from 28% to 18%. Lower upfront costs are likely to encourage fleet operators, state transport undertakings, and corporates to expand and modernise fleets. Affordable ticket fares will improve accessibility for passengers, especially in semi-urban and rural areas, while promoting a shift towards shared mobility.

For trucks and goods carriers — the backbone of India's logistics sector — reduced GST rates mean lower capital costs and cheaper freight charges. This has significant implications for the supply chain of agriculture, FMCG, cement, steel, and e-commerce. Cheaper logistics will not only reduce inflationary pressures but also enhance India's export competitiveness.

The auto component sector, dominated by MSMEs, is also set to gain from a uniform 18% GST rate. With rising demand across vehicle categories, component manufacturers expect higher orders, driving fresh hiring and investment.

The reforms also extend to services linked to goods and passenger transport, with flexible GST rates (5% or 18%) and full input tax credit, helping businesses manage costs better and avoid tax cascading.

Overall, the GST rationalisation is seen as a decisive policy push that could generate a multiplier effect — reviving demand, creating new jobs, boosting MSMEs, and strengthening India's position in global manufacturing.

Forum Malls' Expansion Drive: Is Indian Retail Infrastructure Entering a New Phase?

Forum Malls, part of the Prestige Group, plans to add 14 new malls by 2029. At a time when e-commerce continues to grow, this ambitious expansion signals confidence in India's retail infrastructure and consumer spending.

In a bold move, Forum Malls has announced plans to double its footprint, adding 14 new shopping centres across India in the next four years. The strategy is anchored on India's urban consumption boom and the resilience of physical retail despite the rise of e-commerce.

Among the highlights is an 800,000 square foot athleisure-focused mall near Bengaluru Airport, designed to serve the growing demand for lifestyle and experiential retail. New projects are also slated for Delhi, Mumbai, Chennai, and Hyderabad, underscoring the brand's intent to dominate tier-1 city markets. The timing is deliberate. With the festive season approaching, Forum expects 30–40% of its annual retail sales to be generated in the coming months. Anchoring this with expansion plans sends a strong message of confidence not only in consumer demand but also in the continued relevance of brick-and-mortar retail.

Industry experts argue that malls are no longer just shopping centres; they are evolving into entertainment hubs, community spaces, and lifestyle destinations. This explains why developers like Prestige are investing in premium formats rather than traditional retail spaces. For real estate investors, Forum's announcement is another sign that India's retail infrastructure market is poised for growth. Despite digital disruption, consumer behaviour in India continues to reward physical spaces—especially when integrated with leisure, dining, and brand experiences.

If successful, this expansion could mark a new chapter for Indian retail infrastructure, positioning malls as central to urban social and economic life in the next decade.

Tech, Startups & AI

Industrial Front
EMPOWERS THE INDIAN INDUSTRIES

Innovation in India: ISRO and Tata Elxsi Partner on AI for Satellite Image Analysis

In a ground breaking development for India's space technology sector, the Indian Space Research Organisation (ISRO) has partnered with Tata Elxsi to integrate advanced Artificial Intelligence (AI) solutions for satellite image processing. The collaboration, announced in August 2025, will enhance the accuracy and speed of data interpretation for applications in agriculture, disaster management, urban planning, and climate monitoring.This initiative is part of India's broader vision to leverage AI for national development, enabling faster decision-making and more efficient resource utilization.

By combining ISRO's extensive satellite data with Tata Elxsi's AI expertise, the project is expected to significantly improve real-time analysis capabilities, benefiting both government agencies and private enterprises. Industry experts believe this partnership marks a pivotal step in India's transition towards AI-driven geospatial intelligence, potentially opening new export opportunities for Indian space-tech solutions.

The move reflects the country's growing leadership in merging space science with cutting-edge digital technologies.

Indian Startup Ecosystem Raises $12.8 Billion in 2025, AI and FinTech Lead Investment Surge

India's startup ecosystem has demonstrated remarkable resilience and growth, attracting $12.8 billion in funding across 1,847 deals in the first eight months of 2025. This represents a 28% increase from the same period last year, highlighting investor confidence in Indian innovation.

Artificial Intelligence and Machine Learning startups have emerged as the top funding category, securing $3.2 billion across 342 deals. FinTech companies follow closely with $2.8 billion in 298 funding rounds, whileHealth Tech startups have raised $1.9 billion in 189 deals.

Unicorn Creation and Valuation Growth:

India has added 18 new unicorns in 2025, bringing the total count to 126 companies valued at over $1 billion. The combined valuation of Indian unicorns has reached $485 billion, with fintech companies accounting for 35% of the total value. Notable new unicorns include AI-powered logistics platform LogiNext ($1.2 billion valuation), sustainable fashion marketplace Zilingo ($1.5 billion), and agri-tech company DeHaat ($1.1 billion). These additions demonstrate the diversification of India's unicorn landscape beyond traditional sectors.

Sector-wise Investment Analysis:

Enterprise Software startups have attracted significant investor interest with $2.1 billion in funding, driven by increasing digitization across industries. Cloud infrastructure and cybersecurity companies have been particularly attractive to investors seeking high-growth opportunities.E-commerce and retail tech companies have raised $1.6 billion, with social commerce platforms leading the growth. Quick commerce startups have expanded rapidly, with Zepto and Dunzo raising substantial funding rounds to capture the growing demand for instant delivery services.

Geographic Distribution and Tier-2 City Growth:

While Bangalore, Delhi NCR, and Mumbai continue to dominate with 68% of total funding, tier-2 cities have shown remarkable growth. Pune, Hyderabad, and Chennai have collectively attracted $2.4 billion in startup investments.

Emerging startup hubs in Kochi, Jaipur, and Ahmedabad have witnessed 150% growth in funding, supported by lower operational costs and strong talent availability. State government initiatives and incubation programs have facilitated this geographic expansion.

Employment Generation and Skill Development:

The startup ecosystem has created 4.2 million direct jobs and 12.8 million indirect employment opportunities. Technology roles constitute 45% of startup employment, with average salaries 35% higher than traditional IT companies.

Skill development initiatives by startup associations have trained 850,000 professionals in emerging technologies. The partnership between startups and educational institutions has led to curriculum updates in 1,200 engineering colleges across India.

Government Support and Policy Framework:

The Startup India initiative has recognized 95,000 startups, providing tax exemptions and regulatory support. The Fund of Funds for Startups (FFS) has invested ₹8,500 crore across 850 startups through alternative investment funds.

The proposed Digital India Act and Data Protection Bill have provided regulatory clarity, encouraging international investors to participate in Indian startup funding. These policy frameworks have addressed privacy concerns while promoting innovation.

International Expansion and Global Partnerships:

Indian startups have expanded to 67 countries, with 340 companies establishing international operations. The combined international revenue of Indian startups has reached $18.5 billion, contributing significantly to India's services export.

Strategic partnerships with global technology companies have accelerated Indian startup growth. Microsoft, Google, and Amazon have collectively invested $2.8 billion in Indian startups while providing cloud credits and technical support.

Challenges and Future Outlook:

Despite strong growth, startups face challenges in talent acquisition, regulatory compliance, and market competition. The increasing focus on profitability over growth has led to more sustainable business models and efficient capital utilization.

Industry experts predict continued growth with expected funding of $18-20 billion for the full year 2025. The focus is shifting toward deep-tech innovations, sustainable technologies, and solutions addressing India-specific challenges with global applications.

Apple Launches iPhone 17 Series, But Siri's AI Upgrade Still Pending

Apple's: annual September showcase unveiled the iPhone 17, iPhone 17 Pro, and the ultra-thin iPhone Air, alongside refreshed AirPods and Apple Watch models. The launch highlights Apple's continuing strength in hardware innovation, combining stylish design with improved performance.

The new iPhone Air is Apple's slimmest device yet, designed for users who prioritize portability without sacrificing functionality. The iPhone 17 Pro targets creative professionals and heavy users with an upgraded camera system, brighter display, and longer battery life. The standard iPhone 17 brings incremental improvements, making it a reliable choice for everyday consumers.

Wearables also received attention. The latest Apple Watch models feature advanced health sensors, reinforcing Apple's focus on wellness technology. Updated AirPods promise better sound quality and seamless switching between devices, strengthening Apple's ecosystem appeal.

Yet, the long-anticipated AI-powered Siri was absent. Industry watchers had expected a generative AI upgrade that could rival competitors like Google Gemini and Microsoft Copilot. Analysts suggest Apple is prioritizing on-device AI for privacy reasons, explaining the delay.

Apple's approach seems clear: rely on hardware excellence to maintain loyalty while refining AI integration. For now, consumers get impressive devices but without the smarter, context-aware voice assistant increasingly offered by rivals.

The iPhone 17 series is likely to attract eager buyers, but the spotlight remains on when Apple will deliver the intelligent Siri its users have been waiting for, bridging the gap between advanced hardware and next-level software intelligence.

UPI Goes Global via Postal Network

Integration with Universal Postal Union hailed as game-changer

India's Unified Payments Interface (UPI) has gone global with its integration into the Universal Postal Union (UPU). The announcement came at the Universal Postal Congress in Dubai on 9 September.

The move allows millions to send and receive payments through postal channels, extending UPI's reach far beyond conventional banking. Union Minister Jyotiraditya Scindia captured the significance: "Just as postmen once carried letters to every village, they will now carry digital payments across borders."Experts view this as a game-changer for remittances, particularly for migrant workers. For instance, Indian workers in the Middle East often face high fees for remitting money home; UPI integration promises cheaper, faster, and safer transfers.Already linked with systems in Singapore, UAE, and Nepal UPI's tie-up with UPU creates a truly global payment corridor. The integration will also support

India's ambition to lead the Global South's digital finance revolution.

Fintech leaders are upbeat, with one executive saying: "This move positions UPI not just as India's platform, but as the world's template for low-cost payments."

Institutional Capital Flows: $80 Billion Bet on India's Real Estate Future

A joint study by CREDAI and Colliers reveals that India's real estate sector has attracted $80 billion in institutional investments since 2010. With foreign capital contributing 57% of this amount, the industry is steadily transforming into a globally benchmarked asset class.

India's real estate sector is undergoing a quiet revolution—one powered by institutional money. A new report shows that institutional investors have pumped in $80 billion since 2010, with foreign investors alone accounting for more than half.

This influx of capital has changed the way the sector operates. Once dominated by fragmented developers and informal funding, Indian real estate is now moving toward transparency, corporate governance, and long-term value creation. Large foreign pension funds, sovereign wealth funds, and private equity players are no longer hesitant to place long bets on India's urbanisation story.

The appeal lies in India's fundamentals. Rapid urban migration, rising middle-class incomes, and a government push for infrastructure create a near-guaranteed demand pipeline across residential, office, retail, and warehousing segments. Developers, once reliant on short-term financing, now have access to structured capital that allows them to plan multi-year projects without liquidity shocks. Foreign investors see India as one of the few emerging markets with scale, stability, and consistent returns. By 2047, projections suggest the real estate market could be worth between $5 trillion and $10 trillion, a leap from today's valuation.

Yet, the transformation comes with expectations. Institutional investors demand compliance, efficiency, and sustainability. Developers are increasingly being held accountable not just for project delivery but also for ESG standards, transparency in sales, and returns on capital employed. This shift is pushing the sector into a more professionalised era.

The bottom line: India's real estate sector is no longer a gamble; it is becoming an investment-grade opportunity. The $80 billion inflow is just the beginning of a much larger structural change that could redefine the industry for decades.

Real Estate: DLF Announces ₹2,500 Crore Luxury Residential Project in Gurugram

DLF's Gurugram luxury project: ₹2,500 croreinvestment.

Dlf Limited, India's largest real estate developer, has unveiled plans for a new ultra-luxury residential project in Gurugram, with an estimated investment of ₹2,500 crore. Scheduled for completion by 2028, the project will cater to high-net-worth individuals, offering premium amenities such as private concierge services, landscaped sky gardens, and high-end wellness facilities.

The announcement comes at a time when the luxury housing segment in India is witnessing record demand, fueled by rising disposable incomes, NRI investments, and post-pandemic lifestyle upgrades. DLF's latest venture is strategically located near the city's emerging financial district, providing excellent connectivity to both Delhi and the international airport.

According to market observers, this project could set new benchmarks in the premium real estate category, boosting Gurugram's position as India's most sought-after luxury property destination. With high-value launches dominating the market, DLF aims to maintain its

leadership through exclusivity and innovation in design.

Global & Trade (Policies)

India Poised to Become Third-Largest Global Economy: RBI Governor

Inclusive growth, Jan Dhan Yojana, a nd women-led enterprises hailed as drivers

RBI Governor Sanjay Malhotra has said that India is firmly on the path to becoming the world's third-largest economy, citing a combination of robust GDP growth and inclusive financial policies.
Addressing an economic forum, Malhotra praised the role of the Jan Dhan Yojana, which has brought over 50 crore people into the formal banking system. He highlighted

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Addressing an economic forum, Malhotra praised the role of the Jan Dhan Yojana, which has brought over 50 crore people into the formal banking system. He highlighted "India's growth is not only about numbers. It is about participation—of women, of youth, of entrepreneurs. That is what will sustain us through global turbulence," Malhotra said.
India's GDP is projected to grow at 7–7.5% this year, maintaining its position as the fastest-growing major economy. With structural reforms like GST 2.0 and rising digital adoption, analysts expect India to achieve its $7.3 trillion GDP target by 2030.

India Diversifies Trade Amid US Tariff Strains

India's international trade strategy is undergoing a critical shift as escalating tariff tensions with the United States lead to significant disruptions in bilateral negotiations. Scheduled trade talks for late August were abruptly cancelled following the U.S. administration's decision to levy steep tariffs of up to 50% on key Indian exports, including textiles, engineering goods, and gems. In response, the Indian government has taken a calculated step back from further trade rounds with Washington, reflecting growing discontent over the lack of diplomatic reciprocity.To cushion the impact, India is accelerating efforts to diversify its trade partnerships by actively targeting 50 new markets across West Asia and Africa. The Commerce Ministry is rolling out tailored export strategies focusing on pharmaceuticals, agri-tech, and processed foods—sectors with strong global demand. The Export Promotion Councils are also being mobilized to identify country-specific opportunities and build long-term trade frameworks. Experts note that while such diversification won't yield immediate results, it represents a strategic recalibration aimed at reducing dependence on traditional trade partners. "The current friction with the U.S. is a wake-up call," said Dr. Arvind Sharma, a trade economist. "India needs to leverage its strengths in emerging markets and increase resilience in its export portfolio.In the short term, Indian exporters

are expected to face headwinds, especially those heavily reliant on the U.S. market. However, with diplomatic dialogues continuing at lower levels,"stakeholders remain hopeful that economic logic will eventually prevail over protectionist politics.

Trump Urges EU Tariffs on India, China; Nova Nordisk to Slash 9,000 Job

Trade Tensions and Pharma Layoffs Highlight Global Economic Pressure

Global markets felt the impact of political and corporate developments on Tuesday, signaling fresh strains on the economy. Former US President Donald Trump reportedly suggested that the European Union impose 100% tariffs on imports from India and China to pressure Russia amid the Ukraine war. Though unlikely to take effect immediately, the proposal underscores rising trade tensions, with potential consequences for supply chains, consumer prices, and diplomatic relations. Europe relies heavily on both countries for goods ranging from electronics to medicines, making any tariff escalation a concern for businesses and consumers alike.
Meanwhile, Danish pharmaceutical giant Novo Nordisk announced plans to cut 9,000 jobs worldwide — roughly 11% of its workforce — with most layoffs in Denmark. The move comes as Eli Lilly's Mounjaro outperforms Novo's flagship Ozempic in the obesity treatment market. In addition to workforce reductions, Novo lowered its annual profit forecast, highlighting mounting pressure from competition and slowing growth.
These events reveal the human side of global economic shifts. Workers face job insecurity, consumers may see rising costs, and companies must navigate an increasingly uncertain market. Analysts warn that the combination of trade pressures and corporate downsizing could create broader ripple effects across industries and countries.
As governments and companies make bold strategic decisions, ordinary people — employees, families, and consumers — are often the first to feel the impact, underscoring the interconnected nature of today's global economy.

India Pushes for Swift Free Trade Agreement with European Union

FTA seen as key to diversifying exports amid U.S. tariff challenges

External Affairs Minister S. Jaishankar has reiterated India's determination to fast-track the long-pending India–EU Free Trade Agreement (FTA), calling it a "strategic necessity" in the face of shifting global trade alliances.
During high-level meetings in Brussels, Jaishankar underscored that a comprehensive FTA could unlock vast opportunities for Indian exporters in pharmaceuticals, IT services, textiles, and agri-products. "Europe remains one of India's largest trading partners, and a swift FTA will provide stability, predictability, and access at a time when global supply chains are being disrupted," he said.
The urgency comes against the backdrop of heightened India–U.S. trade tensions, where new U.S. tariffs haveimpacted over 55% of Indian exports to the American market. Former RBI Governor Urjit Patel recently warned that such tariffs could create long-term for Indian exporters, particularly in engineering and manufacturing. For the EU, India's young workforce and rapidly growing middle class represent a lucrative consumer market. For India, the deal is critical to diversifying away from dependence on the U.S. and China.
Industry bodies like FICCI and CII have welcomed the government's push, urging negotiators to ensure favorable terms in digital services, intellectual property, and climate-related trade standards.

Indian Markets Rally On GST Reforms, Oil Relief

Indian stock markets opened higher this week, buoyed by a combination of domestic tax reforms and easing global oil prices. The benchmark indices Nifty 50 and Sensex posted gains of over 1.5% following the announcement of GST slab restructuring and simplification. Investor sentiment has turned bullish, with foreign institutional investors resuming inflows. The rupee also appreciated slightly against the U.S. dollar, signaling broader market confidence. Analysts believe that the elimination of the 28% GST slab and rationalization of other rates have significantly improved the economic outlook. Sectoral indices showed widespread positivity, with FMCG, real estate, and auto stocks leading the rally. "Reforms like this restore investor faith and simplify the tax terrain," noted Sunil Khanna, an equity strategist at Axis Capital.Global factors also played a role. Brent crude prices fell to $78 per barrel, offering relief to India's import-heavy energy bill. As a result, inflation expectations have moderated, further improving the near-term economic climate. The confluence of domestic policy and favorable international cues has set a strong foundation for market momentum in the coming quarters.

India Pushes Rupee to Global Stage in BRICS, Marks Proud Moment in Currency Diplomacy

India's long-standing aspiration to elevate the rupee as a global trade currency took a significant leap this week as the Reserve Bank of India (RBI) and the Ministry of External Affairs confirmed new measures within the BRICS framework to expand trade settlements in rupees.
The development, hailed as a "proud moment for India's financial sovereignty", allows BRICS partner nations to conduct cross-border trade using Special Rupee Vostro Accounts (SRVAs), bypassing the traditional dependence on the U.S. dollar. Officials said the move reflects not only India's growing economic strength but also the trust other emerging economies are placing in the rupee.

A Milestone for India's Currency Diplomacy
The RBI announced that foreign banks from BRICS countries and other trade partners can now open SRVAs without prior approvals, accelerating rupee-based settlements. The change is expected to simplify trade for Indian exporters and reduce transaction costs, especially for SMEs and startups.
"This is not just a technical reform—it is a statement," an official from the Finance Ministry told reporters. "India is signaling to the world that the rupee is ready to share space with the dollar in global trade."
Prime Minister Narendra Modi described the move as "a proud step towards strengthening India's financial sovereignty," adding that the rupee's internationalization will empower Indian businesses and reduce vulnerability to currency shocks.

Global Context: A Shift Beyond the Dollar
The announcement comes at a time when BRICS nations are openly debating ways to reduce overdependence on the U.S. dollar. While talk of a unified BRICS currency remains exploratory, the consensus is shifting toward encouraging local currency trade. Global trust in the dollar, which still accounts for nearly 58% of world reserves, has been shaken in recent years due to geopolitical tensions and unilateral sanctions. India's rupee initiative, alongside platforms like BRICS Pay, is being seen as a pragmatic and confidence-building step toward a multipolar currency order.

Market Reaction and Challenges Ahead
The rupee showed mild appreciation on Thursday, with traders citing optimism over the government's announcement. Market analysts, however, noted that while symbolic, the rupee's road to becoming a true reserve currency will be gradual.
"The significance is geopolitical as much as economic," said Dr. Ritu Singh, an economist at Delhi University. "For the rupee to gain real strength internationally, India must sustain its high growth, ensure macroeconomic stability, and build deep global acceptance."
Still, exporters—especially in the textile, pharmaceuticals, and IT services sectors—are expected to benefit from smoother settlements with BRICS partners.

India's Balancing Act
Experts highlight that India's approach is not aimed at replacing the dollar but at "derisking" international trade. Unlike some BRICS members who have called for a collective alternative currency, India has chosen a calibrated strategy: making the rupee a stronger option without destabilizing global finance.
This careful balance is being praised both domestically and abroad. "It is a proud moment for India because we are not just participants inglobal finance anymore—we are shaping its future," said CII President Sanjiv Bajaj.

Looking Forward
More Bilateral Agreements: India is expected to sign additional pacts with BRICS members to expand rupee trade volumes.
Boost for MSMEs: Lower forex costs and reduced reliance on the dollar could directly benefit small exporters.
Global Perception: If successful, the rupee may gradually feature in reserve portfolios of friendly nations.
As India celebrates this milestone, the move underscores its ambition to become not just the world's fastest-growing economy, but also a currency power in the making.

SBI Stops Foreign Deals with Nayara Energy Amid Sanctions Risk

Mumbai: In a move with significant implications for India's energy trade, the State Bank of India (SBI) has halted international trade and foreign currency transactions with Russia-backed Nayara Energy.
Sources told Business Line that SBI's decision comes amid growing concerns over potential exposure to U.S. secondary sanctions and EU trade restrictions, given the West's continuing embargoes against Moscow. Nayara, which operates India's second-largest single-site refinery in Vadinar, Gujarat, is majority-owned by Russian entities.
The halt in foreign banking support could disrupt Nayara's crude imports and refined product exports, forcing the company to seek alternative financing arrangements through smaller banks or non-dollar-denominated trade.
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The halt in foreign banking support could disrupt Nayara's crude imports and refined product exports, forcing the company to seek alternative financing arrangements through smaller banks or non-dollar-denominated trade.
Industry experts believe the move reflects a cautious approach by Indian lenders to avoid being caught in the crossfire of global sanctions regimes. "This is less about domestic policy and more about protecting banking operations abroad," said a senior economist.
Nayara Energy has yet to issue an official statement, but insiders indicate the company is working with the government to secure alternative trade channels and limit disruption to operations.

India and Israel Sign Landmark Bilateral Investment Agreement to Boost Trade and Innovation

"Synopsis": The agreement promises investor protection, dispute resolution, and policy transparency, while strengthening cooperation in fintech, infrastructure, and digital connectivity.
The Government of India and the Government of Israel have signed a landmark Bilateral Investment Agreement (BIA) aimed at deepening economic ties and creating a more secure environment for investors. The pact, signed in New Delhi by Union Finance Minister Nirmala Sitharaman and her Israeli counterpart Bezalel Smotrich, marks a new chapter in the economic partnership between the two nations.
The agreement ensures a minimum standard of treatment for investors, safeguards against expropriation, guarantees transparency, and allows for smooth transfer of funds and compensation for losses. Importantly, it also establishes an independent dispute resolution mechanism through arbitration — providing businesses with greater confidence in cross-border investments.
Finance Minister Nirmala Sitharaman described the deal as a "historic milestone" in bilateral relations, noting that India's ongoing economic reforms have made it one of the most attractive investment destinations globally. She also urged for greater business interaction between Indian and Israeli companies to unlock the full potential of the agreement.
Israel's Finance Minister Bezalel Smotrich welcomed the move, highlighting the resilience of both countries in achieving high economic growth despite security challenges. He underlined the scope for stronger cooperation in areas such as cybersecurity, defense, high-technology, and financial innovation.
Currently, bilateral investments between India and Israel stand at around USD 800 million. The new framework is expected to significantly scale up this figure by providing stronger safeguards and fostering an investor-friendly climate.
Both ministers also expressed their commitment to advancing cooperation in fintech innovation, infrastructure development, financial regulation, and digital payment connectivity — sectors seen as critical for the future growth of both economies.
The signing of the agreement comes at a time when India is pursuing closer ties with key global partners to diversify investments, strengthen supply chains, and accelerate growth in strategic industries.

Cabinet Clears ₹1,500 Crore Incentive Scheme to Boost Critical Mineral Recycling

Synopsis: The government has approved a major push to build India's recycling capacity for critical minerals, targeting battery waste, e-waste, and vehicle scrap. The move is part of the National Critical Mineral Mission and aims to secure supply chains, attract investments, and generate thousands of jobs.
In a significant step to strengthen India's critical mineral supply chain, the Union Cabinet has approved a ₹1,500 crore incentive scheme to promote recycling from secondary sources. The scheme is designed to support the extraction of vital minerals from e-waste, lithium-ion battery scrap, and end-of-life vehicle parts, aligning with the objectives of the National Critical Mineral Mission (NCMM).
With a six-year rollout beginning FY 2025-26, the scheme provides both capital expenditure (Capex) and operational expenditure (Opex) subsidies to encourage new projects as well as the expansion and modernization of existing recycling units. Large recyclers will be eligible for incentives up to ₹50 crore, while small entities and start-ups can access up to ₹25 crore, ensuring inclusivity across the sector.
Government officials highlighted that the scheme is expected to develop 270 kilo tonnes of annual recycling capacity, producing around 40 kilo tonnes of critical minerals every year. This capacity building is projected to bring in nearly ₹8,000 crore in investment and create around 70,000 direct and indirect jobs.
The focus on recycling is being seen as a pragmatic short-term strategy while the domestic critical mineral mining ecosystem continues to evolve. By tapping secondary sources, India aims to reduce its import dependence, ensure supply chain resilience, and position itself as a key player in the global clean energy and electronics value chains.
Industry leaders have welcomed the move, particularly as demand for lithium, cobalt, and rare earths surges due to the rise of electric vehicles, renewable energy technologies, and advanced manufacturing. The scheme is expected to provide both economic and environmental benefits, driving India's transition toward a circular economy.

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Fast-Tracking of 50 Smart Cities Mission Projects

The government announced the completion deadline for 50 key projects under the Smart Cities Mission has been brought forward by six months. This move is expected to accelerate urban development, create lakhs of jobs in construction and technology, and boost demand for core sectors like cement, steel, and, as highlighted in recent trends, industrial paints and coatings.

Railways Unveils Game-Changing National Logistics Polic

Aiming to slash the high cost of logistics in India—a longstanding hurdle for exporters and manufacturers—the Ministry of Railways unveiled a comprehensive new logistics policy. The policy has a dual focus: maximizing the use of dedicated freight corridors (DFCs) and leveraging Public-Private Partnerships (PPPs) to modernize infrastructure.

The policy mandates the prioritization of freight trains on the newly operational eastern and western DFCs, ensuring faster and more reliable movement of goods across the country. Furthermore, it invites private investment for developing multi-modal logistics parks, warehousing solutions, and last-mile connectivity projects at railway hubs. As reported by The Economic Times, this initiative is expected to reduce freight costs by up to 15%, improve the turnaround time for goods, and significantly decongest the existing railway network by separating passenger and freight streams. This efficiency gain is poised to make Indian exports more competitive globally and boost domestic manufacturing.

Italy's Sicily Bridge: Lessons for Global Infrastructure and India's Megaprojects

Italy has approved a €13.5 billion suspension bridge across the Strait of Messina, linking Sicily to mainland Italy. The megaproject offers valuable lessons for India as it pursues its own infrastructure ambitions. The Italian government has cleared the construction of what could become the world's longest suspension bridge, connecting Sicily with the Italian mainland. With an estimated cost of €13.5 billion and a timeline stretching into the next decade, the bridge aims to create thousands of jobs and boost trade, logistics, and tourism.What stands out is not just the scale but the rationale. Italy sees the bridge as a long-term enabler of regional integration, economic development, and global competitiveness. It is a political as much as an engineering statement. For India, which has its own ambitious infrastructure pipeline—ranging from bullet trains to river-linking projects—Italy's approach offers lessons. Megaprojects require political will, financial innovation, and clear communication with stakeholders.They also demand resilience against criticism, whether environmental, financial, or social. India's push for expressways, metro systems, and industrial corridors shares similarities with Italy's bridge project: both are attempts to physically and symbolically unite regions while stimulating long-term economic growth.Critics may argue about costs, debt, and execution risks. Yet the broader takeaway is clear: minfrastructure remains a cornerstone of national strategy in both developed and developing economies. The Messina Bridge, once complete, could stand as a global reminder that bold projects—when executed well—can redefine nations and regions for generations.

ITC Hotels Expands Growth Plan, Eyes 220 Properties by 2030

Fresh from its demerger from ITC Ltd., ITC Hotels has revised its growth ambitions, setting a target of 220 hotels by 2030, up from the earlier goal of 200.Currently, the hospitality chain operates 140 properties across India under brands such as ITC Hotels, Welcome hotel, Fortune, and Storii.

The expansion will be driven largely by asset-light management contracts, allowing ITC to scale without heavy capital expenditure. In FY24, the company signed 30 management agreements, adding over 3,000 keys to its network. The current development pipeline includes 58 hotels with more than 5,300 rooms.

Chairman Sanjiv Puri attributed the bullish outlook to the resurgence in tourism post-pandemic and the government's infrastructure push. "With India's growing appeal as both a leisure and business travel destination, we are confident of surpassing our targets well before schedule," he said.

Industry analysts believe ITC Hotels' strategy aligns with the broader trend of hospitality companies seeking growth via flexible partnerships rather than ownership-heavy models.

Adani Green Commissions 700 MW Solar-Wind Hybrid Project in Rajasthan

Adani Green Energy Ltd (AGEL) has commissioned a landmark 700 MW hybrid renewable energy project in Jaisalmer, Rajasthan. Combining both solar and wind power, the project is among the largest hybrid facilities in Asia, designed to supply uninterrupted clean energy to industrial and residential grids.

This mega - project is expected to offset 1.2 million tonnes of CO_2 emissions annually, in line with India's commitment to achieving net zero emissions by 2070. The hybrid design ensures higher efficiency, as solar energy complements daytime demand while wind power contributes at night.

Speaking on the occasion, Gautam Adani, Chairman of Adani Group, emphasized that this project represents India's shift from being a fossil-fuel-heavy economy to one powered by renewables. He reaffirmed AGEL's target of achieving 45 GW of renewable capacity by 2030.

The project is equipped with smart grid integration and AI-based predictive maintenance, ensuring operational efficiency. The power generated will supply both industrial zones in Rajasthan and discoms in neighboring states, enhancing regional energy security.

With India already the world's third-largest renewable energy producer, hybrid projects like these are expected to dominate future capacity additions. Analysts predict strong investor confidence in AGEL as the company accelerates its renewable roadmap.

L&T Secures ₹7,000 Crore Projects Across Power & Infrastructure Sectors

Larsen & Toubro (L&T), one of India's leading engineering and construction giants, has strengthened its infrastructure portfolio by securing new projects worth over ₹7,000 crore across power, metro rail, and renewable energy sectors. These orders, spanning both domestic and international markets, reinforce L&T's position as a global EPC (engineering, procurement, construction) leader and reflect India's rising demand for sustainable infrastructure.

The company has received a major order for a metro rail project in South India, aimed at expanding urban mobility and reducing carbon emissions. With cities facing traffic congestion and rising pollution levels, metro expansion projects are seen as a critical step in India's smart city transformation.

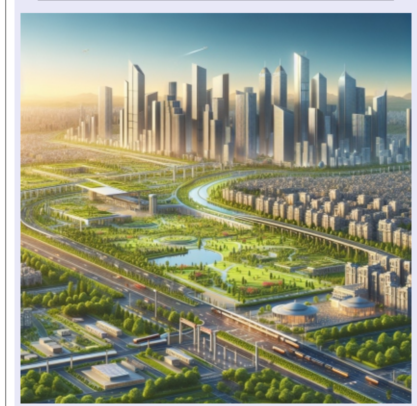
In addition, L&T's Power Transmission & Distribution (PT&D) arm has secured multiple contracts for green hydrogen and solar plants, further aligning with India's renewable energy ambitions. With the government's push for 500 GW of non-fossil fuel-based power by 2030, L&T is well-positioned to play a key role. Another significant project includes international EPC work for substations and smart grid upgrades in the Middle East. This reinforces L&T's export capabilities, especially in regions investing heavily in energy diversification.

Company executives stated that these wins not only bolster L&T's order book but also highlight its commitment to sustainability, technology-driven execution, and on-time delivery. With strong margins and robust demand, analysts expect L&T to maintain double digit revenue growth in FY25.

As infrastructure becomes the backbone of India's industrial growth, L&T's diversification into green projects ensures its long-term resilience.

Maharashtra Approves ₹6,500 Crore 'New Nagpur' Business Hub

Project promises 5 lakh jobs and positions Vidarbha as an investment magnet



The Maharashtra government has cleared a ₹6,500 crore mega-project aimed at transforming Nagpur into a hi-tech business and financial hub. Dubbed "New Nagpur," the project envisions an International Business and Finance Centre (IBFC), knowledge parks, industrial clusters, and underground utility corridors.

Backed by a ₹6,500 crore loan from HUDCO, the project will allocate ₹3,000 crore for land acquisition and ₹3,500 crore for infrastructure. Officials estimate the development could create over 500,000 jobs in sectors such as IT, financial services, logistics, and manufacturing.

Chief Minister Eknath Shinde said the project would act as a magnet for global investors. "Nagpur's strategic location at the heart of India makes it ideal for becoming a hub of business and commerce. New Nagpur will not only stop talent drain but also attract world-class enterprises," he said.

Urban planners note that the project reflects India's growing emphasis on balanced regional development, moving beyond metros like Mumbai and Bengaluru. The proposed IBFC will also offer single-window clearance to reduce red tape, a measure expected to help SMEs and startups set up operations quickly.

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