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## Queensland clean technologies exports

Green building opportunities: **India****Market trends – green building in India**

- There are significant and growing opportunities for more Queensland exporters to get into green markets and provide environmental solutions, such as renewable energy, sustainable water technologies and green building services and products.<sup>1</sup>
- A key market for Queensland's green building exports is India, with the Indian construction sector contributing 10 per cent of India's GDP and growing at a rate of 9.2 per cent per annum.
- According to the Indian Green Building Council:
  - › the market for Leadership in Energy and Environmental Design (LEED)-rated green buildings in India is projected to increase to A\$5B by 2012, and
  - › the total market for green building materials and equipment in India is estimated to be more than 10 times the size of the LEED-rated green building market in India.

Year	Projected certified green buildings (number/year)	LEED-rated green buildings estimated market potential in A\$M
2007	50	250
2008	150	625
2012	1000	5000

Source: Indian Green Building Council

- India's green building footprint has grown from 1858m<sup>2</sup> in 2003, to projects covering 12.54 million m<sup>2</sup> by mid-2008.
- A variety of green building projects are planned or have been completed, including exhibition centres, residential complexes, hospitals, IT parks, educational institutions, laboratories, airports, corporate offices and government buildings.
- National shortages of water and power are significant factors encouraging India's focus on green building.
- The major drivers for the green building sector in India are coming from the private sector, spurred by the introduction of the Indian LEED rating system, and investor and occupier demand for more amenable and efficient living and working space.

**Opportunities for Queensland exporters**

- These trends suggest significant and growing market opportunities for green building in India.



- Trade Queensland has identified the green building sector as having a large concentration of existing and potential Queensland clean technologies exporters. Trade Queensland is currently progressing several green building export initiatives.
- Opportunities in India for Queensland green building services exporters include:
  - › architectural and engineering services for high-rise structures, theme parks and hotels
  - › urban planning and design
  - › other niche architectural services, and
  - › energy efficiency consultancies.<sup>2</sup>
- There is also significant demand in India for Queensland's green building materials and equipment including:
  - › high-efficiency heating, ventilation and air conditioning (HVAC) systems
  - › low-emission window and day lighting technologies
  - › affordable green building materials, with consideration for the life cycle perspective of building costs
  - › water saving and efficiency and storage systems
  - › fire and safety systems and other intelligent building systems, and
  - › other environmentally friendly green building materials and equipment that help score points under the LEED green building rating system.<sup>3</sup>

## Market challenges

- It is important Queensland green building firms that are considering exporting to India:
  - › research the opportunities and their potential competition in the Indian marketplace, especially considering a move towards affordable green buildings
  - › identify niche market opportunities for their green building products and / or services
  - › consider connecting and / or partnering with Indian firms as part of their market strategy, and
  - › understand the LEED green building rating system in terms of the Indian environment and how that would relate to their service or product.
- For example, according to the Clean Energy Council, Australia, companies in the architectural sector may be required to establish a local presence or build partnerships with Indian firms to win work and to utilise Indian cost structures for detailed design of Australian concepts.

## For more information

To find out more about global green building market trends and opportunities for Queensland exporters, please contact Trade Strategy on +61 7 3224 4230 or [tradestrategy@trade.qld.gov.au](mailto:tradestrategy@trade.qld.gov.au)

Interested companies can also visit [export.qld.gov.au](http://export.qld.gov.au)

## Other issues in the green building series

Issue 1 – Green building opportunities: USA

Issue 2 – Green building opportunities: China

Issue 3 – Green building opportunities: the Gulf States

Issue 5 – Green building opportunities: Singapore

Issue 6 – Green building opportunities: global demand

## Coming soon

Series examining water and wastewater technologies and services export opportunities in key overseas markets.

**In recent years, India has emerged as one of the world's top destinations for green buildings and has implemented a number of home-rating schemes and building codes, which open up a wide range of opportunities in construction, architecture and engineering design, building materials and equipment manufacture.**

**Renewable Energy and Energy Efficiency Partnership (REEEP) and the Clean Energy Council, Australia**

## Selected references

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*Designbuild 2009 Trip Report*, Trade Queensland, 2009.

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*Green Gold Rush: How Ambitious Environmental Policy Can Make Australia a Leader in the Global Race for Green Jobs*, Australian Conservation Council and the ACTU, October 2008.

*Regional Export Opportunities for Australia's Clean Energy Industry*, Renewable Energy and Energy Efficiency Partnership (REEEP) and the Clean Energy Council, Australia, the Australian Trade Commission, June 2008.

<sup>1</sup>"Green building" includes (but not limited to): green design and sustainable urban design and engineering consultancies; energy, insulation, air-conditioning and water efficiency equipment and products; building monitoring and management systems; facility/building management; and other environmentally friendly building products and services that help score points under the various "green building" rating schemes (e.g. retro-fitting existing buildings).

<sup>2</sup>This is based on findings by Trade Queensland's India Office as well as separate research by the Australian Trade Commission on demand in India for Australian green building products and services.

<sup>3</sup>Ibid.

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