

India Flat Glass Market By Type (Clear Float Glass, Tempered Glass, Insulated Glass, Coated Glass, Annealed Glass, Laminated Glass), By Thickness (Thin Glass, Thick Glass), By Application (Building & Construction, Automotive, Furniture, Electronics, Solar Energy, Others), By End-User (Residential, Commercial, Industrial, Automotive, Others), By Region, Competition, Forecast and Opportunities, 2020-2030F

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Report description:

The India Flat Glass Market was valued at USD 3.61 Billion in 2024 and is expected to reach USD 5.74 Billion by 2030 with a CAGR of 7.88% during the forecast period.

The India Flat Glass Market has experienced substantial growth over the past few years, driven by rapid urbanization, increasing construction activities, and a growing emphasis on energy efficiency. Flat glass, which includes a wide range of products such as windows, doors, mirrors, and glass facades, plays a crucial role in the building and construction industry. The demand for flat glass is further propelled by the government's initiatives aimed at enhancing housing and infrastructure, notably through schemes like Housing for All and the Smart Cities Mission.

In the residential sector, the trend toward modern architecture is boosting the demand for aesthetic and functional flat glass solutions. Large glass facades and windows are increasingly favored for their ability to provide natural light, enhance energy efficiency, and create visually appealing environments. Additionally, laminated and tempered glass products are gaining traction due to their safety features, making them essential for both residential and commercial applications.

The automotive sector is another significant driver of the flat glass market in India. With rising vehicle production and sales, there is a growing demand for automotive glass, including windshields and side windows. As consumer preferences shift toward safer and more fuel-efficient vehicles, manufacturers are focusing on integrating advanced flat glass technologies that offer better insulation and durability.

Energy efficiency is a major trend influencing the flat glass market, as consumers and businesses alike prioritize sustainable

building practices. Low-emissivity (Low-E) glass, which minimizes heat transfer, is increasingly being adopted in commercial buildings and residential complexes to reduce energy consumption and enhance comfort. This shift towards energy-efficient products aligns with global sustainability goals and regulatory standards, further supporting market growth. Moreover, advancements in manufacturing technologies, such as the introduction of automated production lines and innovative glass treatments, are enhancing the quality and performance of flat glass products. These innovations are enabling manufacturers to meet the diverse needs of consumers, ranging from basic to high-performance glass solutions.

Key Market Drivers

Rapid Urbanization

India is witnessing one of the most significant urbanization trends globally, with millions migrating to urban areas in search of better economic opportunities and living standards. This influx is leading to a surge in housing demand, which directly impacts the flat glass market. Urbanization is characterized by the development of residential, commercial, and industrial infrastructures, necessitating the use of flat glass in construction. As urban landscapes evolve, architects and builders are increasingly opting for aesthetic and functional glass solutions, such as large windows and glass facades, to enhance natural lighting and visual appeal. The Indian government's initiatives, like the Smart Cities Mission and Housing for All, further bolster this demand by promoting modern infrastructure and efficient housing solutions. Additionally, the growing trend of mixed-use developments, combining residential, commercial, and recreational spaces, creates a demand for versatile flat glass applications, including partition walls and storefronts. As urban areas expand, the need for energy-efficient building materials becomes critical, and flat glass products like low-emissivity (Low-E) glass contribute to reducing energy consumption. Thus, the rapid urbanization in India serves as a fundamental driver for the growth of the flat glass market, facilitating innovations and expanding opportunities for manufacturers and suppliers in the industry.

Government Initiatives and Policies

The Indian government plays a pivotal role in driving the flat glass market through various initiatives and policies aimed at enhancing infrastructure development and improving housing conditions. Programs like Pradhan Mantri Awas Yojana (PMAY) and the Smart Cities Mission are designed to facilitate affordable housing and urban regeneration, creating significant opportunities for the flat glass sector. These initiatives encourage the construction of residential and commercial properties, which in turn fuels the demand for flat glass products. Moreover, the government's focus on sustainable building practices and energy-efficient solutions aligns with the growing consumer preference for environmentally friendly materials. Regulatory standards promoting the use of energy-efficient glazing systems further enhance the market for flat glass. Additionally, policies supporting foreign direct investment (FDI) in the construction and real estate sectors enable international players to enter the Indian market, bringing advanced technologies and innovations that boost flat glass production capabilities. By fostering a conducive environment for investment and innovation, government initiatives enhance the overall growth of the flat glass market, leading to improved product offerings and expanded applications across various sectors, including residential, commercial, and automotive.

Growing Demand from the Automotive Sector

The automotive sector is a significant driver of the flat glass market in India, contributing to its growth through rising vehicle production and sales. With India emerging as one of the largest automobile markets globally, the demand for automotive glass, including windshields, side windows, and rear windows, is escalating. The shift towards advanced vehicle designs, coupled with an increasing emphasis on safety and comfort, has prompted manufacturers to incorporate high-quality flat glass solutions that enhance the driving experience. Additionally, the growing consumer preference for electric and hybrid vehicles, which often feature larger and more aerodynamic glass surfaces, further boosts the demand for specialized flat glass products. Automotive manufacturers are increasingly adopting innovative technologies, such as laminated and tempered glass, to improve safety standards and reduce weight, thereby enhancing fuel efficiency. Moreover, as automotive regulations become more stringent regarding safety and environmental impact, the demand for energy-efficient and high-performance glass solutions continues to rise. This growth is complemented by the government's push for the automotive industry, as seen in initiatives like the Automotive Mission Plan, aimed at making India a global manufacturing hub. Overall, the expanding automotive sector not only drives demand for flat glass but also encourages manufacturers to innovate and develop advanced glass products that cater to evolving consumer needs and regulatory requirements.

Increased Focus on Energy Efficiency and Sustainability

The growing emphasis on energy efficiency and sustainability is a significant driver of the flat glass market in India. As environmental concerns and the need for sustainable building practices gain traction, consumers and builders are increasingly seeking flat glass solutions that reduce energy consumption and enhance overall building performance. Low-emissivity (Low-E) glass, which reflects infrared light while allowing visible light to pass through, has gained popularity for its ability to minimize heat transfer, thereby reducing heating and cooling costs. This demand for energy-efficient products is further supported by government regulations and incentives aimed at promoting green building practices and reducing carbon footprints. The Indian government has implemented policies encouraging the use of energy-efficient materials in construction, leading to a rise in the adoption of flat glass products that meet these standards. Moreover, the trend towards sustainable architecture, characterized by the integration of natural light and eco-friendly materials, aligns with the use of flat glass solutions in both residential and commercial projects. Additionally, increasing awareness among consumers about the benefits of energy-efficient buildings, including lower utility bills and enhanced comfort, drives the demand for high-performance flat glass. As sustainability becomes a core value in construction, manufacturers are compelled to innovate and develop new glass technologies that enhance energy efficiency while maintaining aesthetic appeal. This focus on sustainability not only supports market growth but also encourages the development of a more environmentally conscious construction industry in India.

Key Market Challenges

Fluctuating Raw Material Prices

One of the significant challenges facing the India Flat Glass market is the volatility in raw material prices. The primary materials used in flat glass production, such as silica sand, soda ash, and limestone, are subject to fluctuations due to various factors, including global demand, supply chain disruptions, and geopolitical events. For instance, any increase in the prices of these raw materials can significantly impact production costs, forcing manufacturers to either absorb the costs or pass them onto consumers. This situation may lead to decreased competitiveness, particularly against imported flat glass products that might not face similar price pressures. Additionally, fluctuations in energy prices, as glass manufacturing is energy-intensive, can further complicate cost management for manufacturers. Such unpredictability can hinder long-term planning and investment decisions, making it difficult for companies to maintain stable profit margins and overall profitability.

Intense Competition

The India Flat Glass market is characterized by intense competition among domestic and international players. With numerous manufacturers vying for market share, companies face pressure to differentiate their products and offer competitive pricing. This competitive landscape often leads to price wars, which can erode profit margins for manufacturers. Furthermore, the entry of new players with advanced technologies and innovative products can disrupt established market dynamics, forcing existing companies to invest in research and development to stay relevant. To combat competition, manufacturers must continually innovate, improve efficiency, and focus on quality. However, these measures require significant investment, which can be a barrier for smaller players in the market. Additionally, competition can also lead to oversupply in certain segments, making it challenging for manufacturers to achieve desired sales volumes.

Regulatory Compliance

Compliance with various environmental regulations poses a significant challenge to the India Flat Glass market. Manufacturers must adhere to stringent standards regarding emissions, waste management, and resource usage. The Indian government has implemented various regulations to reduce the environmental impact of industrial processes, which can necessitate costly investments in cleaner technologies and waste treatment facilities. Non-compliance can result in legal penalties, damage to brand reputation, and increased scrutiny from regulatory authorities. Additionally, as consumers become more environmentally conscious, there is growing pressure on manufacturers to adopt sustainable practices. This shift may require companies to overhaul their production processes, which can be time-consuming and financially burdensome, particularly for smaller firms. Navigating this complex regulatory landscape requires a dedicated focus on sustainability and compliance, which can divert resources from core business operations.

Technological Advancements

The rapid pace of technological advancements in the flat glass industry presents both opportunities and challenges. While innovation can lead to improved product performance and new applications, keeping up with technological changes can be demanding for manufacturers. Companies need to invest continuously in research and development to adopt advanced

production technologies, such as automated manufacturing processes and cutting-edge glass treatments. This requirement can strain financial resources and operational capabilities, particularly for smaller players who may lack the capital to invest in new technologies. Additionally, the adoption of new technologies often necessitates staff training and upskilling, which can further complicate operations. Companies that fail to innovate risk losing market share to competitors who can offer superior products and services. Furthermore, the increasing integration of smart technologies in flat glass applications, such as energy-efficient windows and smart glazing solutions, creates pressure for manufacturers to evolve rapidly to meet changing consumer preferences.

Supply Chain Disruptions

The flat glass market in India faces challenges related to supply chain disruptions, which can adversely affect production and distribution. Events such as the COVID-19 pandemic have highlighted vulnerabilities in global supply chains, causing delays in raw material deliveries and increased transportation costs. These disruptions can lead to production halts, stock shortages, and inability to fulfill customer orders, ultimately affecting revenue and market share. Moreover, the reliance on global suppliers for certain raw materials can expose manufacturers to geopolitical tensions and trade restrictions, further complicating the supply chain landscape. Companies must develop resilient supply chain strategies to mitigate these risks, which may involve diversifying suppliers, increasing inventory levels, or investing in local sourcing. However, these strategies require careful planning and investment, which can be challenging for manufacturers operating with thin margins. The ability to navigate supply chain complexities effectively is crucial for sustaining competitiveness in the Indian flat glass market.

Key Market Trends

Increasing Demand for Energy-Efficient Glass Solutions

The demand for energy-efficient glass solutions is rapidly rising in the India Flat Glass Market, primarily driven by growing environmental awareness and government initiatives promoting sustainable construction practices. Low-emissivity (Low-E) glass, which minimizes heat transfer and enhances insulation, is gaining popularity in both residential and commercial buildings. This trend is fueled by the need to reduce energy consumption, lower utility costs, and enhance occupant comfort. As urbanization accelerates, more buildings are adopting energy-efficient designs, resulting in increased adoption of advanced glass technologies. Additionally, regulatory frameworks aimed at improving energy efficiency standards in construction further support this trend. Manufacturers are responding by developing innovative glass products that not only meet aesthetic requirements but also offer superior thermal performance. This shift towards energy-efficient flat glass solutions aligns with global sustainability goals and positions the Indian market for substantial growth in the coming years.

Growing Use of Smart Glass Technology

The emergence of smart glass technology is revolutionizing the India Flat Glass Market, offering new functionalities and enhancing user experience. Smart glass, which can change its properties in response to environmental conditions or user inputs, is increasingly being integrated into residential and commercial buildings. This technology provides various benefits, including privacy control, glare reduction, and energy savings. For instance, electrochromic glass can transition from transparent to opaque, allowing users to manage light and heat while maintaining aesthetics. The growing focus on smart buildings and automation in urban infrastructure is driving the adoption of smart glass solutions. Additionally, as more consumers seek innovative and technologically advanced products, the demand for smart glass is expected to rise significantly. Manufacturers are investing in research and development to create cutting-edge smart glass solutions that cater to the evolving preferences of end-users, further propelling market growth.

Rise of Sustainable Construction Practices

The flat glass market in India is witnessing a notable shift towards sustainable construction practices, driven by increased environmental awareness and regulatory pressures. Builders and developers are increasingly prioritizing eco-friendly materials, leading to higher demand for recyclable and energy-efficient flat glass products. This trend is reflected in the growing popularity of laminated glass, which not only enhances safety but also contributes to energy efficiency by minimizing heat loss. Additionally, the Indian government has implemented various policies and initiatives to promote green building practices, encouraging the use of sustainable materials in construction. This regulatory support further fuels the demand for flat glass products that meet sustainability standards. Manufacturers are responding to this trend by innovating and offering a wider range of sustainable glass solutions. The rise of sustainable construction practices is not only beneficial for the environment but also positions the India Flat

Glass Market for long-term growth, as eco-conscious consumers increasingly favor sustainable building materials.

Technological Advancements in Flat Glass Manufacturing

Technological advancements in flat glass manufacturing are transforming the India Flat Glass Market, leading to improved product quality, efficiency, and customization options. Innovations in production techniques, such as automated glass cutting and coating processes, are enhancing the precision and consistency of flat glass products. This allows manufacturers to meet the diverse needs of various sectors, from construction to automotive. Additionally, advancements in glass treatment technologies, such as tempering and lamination, are improving the safety and performance characteristics of flat glass products. As a result, manufacturers can offer a wider range of high-performance solutions that cater to the growing demands of consumers. The adoption of digital technologies, including Industry 4.0 and smart manufacturing, is also enabling manufacturers to optimize their operations, reduce waste, and enhance productivity. This trend towards technological innovation is essential for sustaining competitive advantage in the rapidly evolving flat glass market. As manufacturers continue to embrace new technologies, the India Flat Glass Market is expected to witness significant growth and transformation, creating opportunities for both established players and new entrants.

Segmental Insights

Type Insights

Clear Float Glass segment dominated in the India Flat Glass market in 2024, driven by its versatility, aesthetic appeal, and wide-ranging applications across various sectors. Clear Float Glass, characterized by its clarity and smooth surface, is extensively used in the construction industry for windows, facades, and interior partitions, making it a preferred choice among builders and architects. As urbanization accelerates in India, there is a growing demand for residential and commercial buildings, propelling the need for Clear Float Glass to enhance natural lighting and create visually appealing environments.

One of the significant factors contributing to the dominance of Clear Float Glass is its cost-effectiveness compared to other specialty glass products. While advanced glass types such as low-E and laminated glass offer enhanced performance characteristics, Clear Float Glass remains an economical option for many applications, particularly in the residential sector. This affordability makes it an attractive choice for builders and homeowners looking to balance quality with budget constraints.

Clear Float Glass is readily available and can be easily customized in terms of size and thickness, catering to diverse project requirements. The growing trend of open and spacious designs in modern architecture further enhances the appeal of Clear Float Glass, as it allows for larger windows and expansive glass facades that can connect indoor spaces with the outdoors.

Advancements in manufacturing technologies have improved the quality and durability of Clear Float Glass, making it a reliable option for various applications. The introduction of automated production lines has streamlined the manufacturing process, ensuring consistent quality and reducing lead times.

Regional Insights

South India dominated the India Flat Glass market in 2024, driven by several key factors, including rapid urbanization, robust infrastructure development, and a booming construction industry. Cities such as Bengaluru, Chennai, and Hyderabad are experiencing significant growth, attracting investments and fostering an environment conducive to residential and commercial projects. This surge in construction activities is fueling the demand for flat glass products, particularly for applications in windows, facades, and interior partitions.

One of the primary reasons for South India's dominance is the region's strong economic performance. The southern states, known for their industrial and technological advancements, have seen an influx of businesses and skilled labor. This economic boom is resulting in increased demand for high-quality flat glass solutions in both residential and commercial sectors. The presence of numerous IT parks, commercial complexes, and manufacturing units further drives the requirement for flat glass products, creating a vibrant market for suppliers.

South India has a favorable climate for glass production and utilization. The region's warm climate encourages the use of energy-efficient glass solutions to enhance thermal insulation and reduce cooling costs. This trend aligns with growing consumer awareness regarding energy conservation and sustainability, further bolstering demand for advanced flat glass products such as low-emissivity (Low-E) glass.

South Indian market benefits from a well-established network of manufacturers and suppliers, ensuring a steady supply of flat glass products to meet the growing demand. The presence of local manufacturers enables faster delivery times and customized

solutions, enhancing customer satisfaction.

Key Market Players

□□Asahi India Glass Limited

□□SAINT-GOBAIN INDIA PRIVATE LIMITED

□□Borosil Limited

□□Jumbo India Private Limited

□□Hindusthan National Glass & Industries Limited

□□Triveni Glass Limited

□□Indo Asian Fusegear Ltd

□□Siddhivinayak Glass Industries Private Limited

□□Brahmaputra Metallics Limited

□□Shri Rishabh India Private Limited

Report Scope:

In this report, the India Flat Glass Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□□India Flat Glass Market, By Type:

- o Clear Float Glass
- o Tempered Glass
- o Insulated Glass
- o Coated Glass
- o Annealed Glass
- o Laminated Glass

□□India Flat Glass Market, By Thickness:

- o Thin Glass
- o Thick Glass

□□India Flat Glass Market, By Application:

- o Building & Construction
- o Automotive
- o Furniture
- o Electronics
- o Solar Energy
- o Others

□□India Flat Glass Market, By End-User:

- o Residential
- o Commercial
- o Industrial
- o Automotive
- o Others

□□India Flat Glass Market, By Region:

- o North India
- o South India
- o West India
- o East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the India Flat Glass Market.

Available Customizations:

India Flat Glass Market report with the given market data, TechSci Research offers customizations according to a company's

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specific needs. The following customization options are available for the report:

Company Information

□□Detailed analysis and profiling of additional market players (up to five).

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