

India Fibre Cement Boards and Sheets Market By Raw Material (Asbestos, Non-Asbestos), By Application (Roofing, Siding, Cladding, Moulding & Trimming, Others), By End Use (Residential, Non-residential), By Region, Competition, Forecast & Opportunities, 2020-2030F

Market Report | 2025-01-17 | 88 pages | TechSci Research

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Report description:

India Fibre Cement Boards and Sheets market was valued at USD 5.1 billion in 2024 and is expected to reach USD 8.62 billion by 2030 with a CAGR of 8.98% during the forecast period.

The India Fibre Cement Boards and Sheets Market is driven by rapid urbanization and industrialization, which increase demand for durable and versatile construction materials. The growth in the real estate sector, coupled with government initiatives for affordable housing and infrastructure development, fuels market expansion. Additionally, the shift towards eco-friendly and energy-efficient building solutions supports the adoption of fibre cement products. Their fire-resistant, termite-proof, and low-maintenance properties make them popular among builders and homeowners. Increasing awareness of sustainable construction practices and the replacement of asbestos-based materials further propel market growth, as does the rising trend of interior decoration and modular construction.

Key Market Drivers

Rising Demand for Sustainable and Eco-Friendly Construction Materials

The growing emphasis on sustainability and eco-friendly building practices is a key driver of the fibre cement boards and sheets market in India. As awareness of environmental concerns rises among consumers, governments, and industries, there is a noticeable shift toward the adoption of sustainable construction materials. Fibre cement products are increasingly recognized for their environmental benefits, which include reduced carbon footprint and recyclability.

Fibre cement boards and sheets are manufactured from natural materials, including cement, sand, and cellulose fibres, which makes them an environmentally friendly alternative to conventional building materials. The production process for fibre cement is less energy-intensive compared to traditional materials like clay bricks, which require high temperatures for firing, contributing to

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lower carbon emissions. Additionally, fibre cement products do not contain harmful chemicals like asbestos, making them a safer and more eco-friendly option for both construction workers and building occupants.

India's growing focus on green building certifications such as LEED (Leadership in Energy and Environmental Design) has further propelled the demand for fibre cement boards. These certifications reward buildings that minimize environmental impact by using sustainable materials, energy-efficient designs, and low-emission products. Fibre cement boards, due to their eco-friendly composition and performance characteristics, are ideal for meeting the stringent criteria set by these green building standards. Furthermore, fibre cement products are long-lasting, which reduces the need for frequent replacements and maintenance, contributing to lower waste generation and a more sustainable lifecycle. The durability and resistance of fibre cement boards to termites, mold, and fire further enhance their eco-friendly credentials, as they do not require chemical treatments or frequent repairs.

The government's focus on promoting sustainable development through initiatives like the "Swachh Bharat Abhiyan" and "National Action Plan on Climate Change" also supports the demand for eco-friendly materials. As construction practices evolve to meet sustainability standards, fibre cement boards and sheets are positioned as a preferred choice for environmentally conscious builders, contributing to the growth of the market. As of 2024, India has more than 7,000 green building projects, covering over 7.3 billion square feet. The country is the 2nd largest green building market in the world, behind the United States.

Technological Advancements in Product Development

Technological advancements in the manufacturing and application of fibre cement boards and sheets are significantly driving the market in India. Innovations in production processes have led to improved product performance, higher quality, and expanded applications, enhancing the appeal of fibre cement boards in various construction sectors.

One of the key technological advancements is the development of fibre cement boards with enhanced water resistance, which has made them ideal for use in areas prone to high humidity or rainfall. These boards are now available with advanced moisture-resistant properties, preventing issues like swelling, warping, or mold growth, which were challenges for earlier generations of fibre cement products. Such improvements have made them suitable for applications in bathrooms, kitchens, and coastal areas where moisture resistance is critical. Additionally, advancements in the manufacturing process have resulted in lighter and thinner fibre cement boards without compromising strength and durability. The reduced weight of these boards has made them easier to handle and install, reducing labor costs and construction time. This ease of installation is particularly beneficial for projects that require rapid turnaround, such as commercial buildings and infrastructure projects, driving demand for fibre cement sheets and boards. Moreover, there have been significant improvements in the aesthetic appeal of fibre cement products. Advances in surface finishing technologies now allow for a wider variety of textures, colors, and patterns, enabling designers and architects to create more visually appealing and customized structures. Fibre cement boards are now available with different finishes, such as smooth, rough, and patterned surfaces, which make them suitable for both exterior and interior applications, including wall cladding, roofing, and flooring.

The development of fire-resistant fibre cement boards has also expanded their use in fire-prone areas, further increasing their market share. These innovations are a direct response to evolving market demands, where safety, aesthetics, and performance are increasingly prioritized in the construction industry. Technological advancements in fibre cement boards and sheets continue to shape the market by improving product performance, durability, and versatility, positioning them as a highly desirable option for modern construction needs.

Government Initiatives and Policies

Government initiatives and policies play a pivotal role in driving the growth of the fibre cement boards and sheets market in India. With the government focusing on infrastructure development, affordable housing, and sustainability, fibre cement products have gained significant traction due to their alignment with these objectives.

The "Housing for All" mission, which aims to provide affordable housing to every Indian household by 2022, has been a major driver for the adoption of fibre cement boards in residential construction. Fibre cement boards are an ideal solution for low-cost housing projects as they are both cost-effective and durable. Their resistance to termites, moisture, and fire also makes them a safer and more reliable choice compared to conventional materials.

The Indian government has also prioritized the development of smart cities, which require the use of modern construction materials that meet high standards for durability, energy efficiency, and environmental impact. Fibre cement boards are

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well-suited for this purpose, as they offer the required performance characteristics while being lightweight and easy to install. These products are being increasingly used in both private and government projects, contributing to the growing demand for fibre cement materials. In addition to infrastructure and housing development, the government's emphasis on environmental sustainability has led to policies that encourage the use of eco-friendly building materials. Incentives for green construction and the adoption of LEED certifications further promote the use of fibre cement products. The introduction of building codes and regulations that mandate the use of non-toxic, fire-resistant, and weather-resistant materials in construction is also encouraging the shift toward fibre cement boards. Furthermore, policies aimed at reducing the country's reliance on traditional building materials, such as clay bricks, have encouraged the adoption of alternatives like fibre cement. As the government continues to promote modern and sustainable construction practices, fibre cement boards and sheets are expected to remain a key component of India's building material landscape, fostering further market growth.

Key Market Challenges

High Raw Material Costs and Supply Chain Disruptions

One of the key challenges facing the India fibre cement boards and sheets market is the volatility in raw material prices. Fibre cement products are made using a mix of cement, cellulose fibres, silica, and other additives. The prices of these materials are influenced by factors like inflation, changes in global demand, and supply chain disruptions, which can significantly affect production costs. This challenge is particularly acute in the Indian market, where the reliance on both domestic and imported raw materials creates a vulnerability to price fluctuations.

Cement, being one of the most critical components, is subject to pricing pressures due to its direct link to the construction industry. The demand for cement is cyclical, and any disruption in its availability, such as logistical bottlenecks or fluctuations in fuel costs, can result in higher production costs for fibre cement products. Likewise, the cellulose fibre used in these boards is often sourced from specific suppliers, some of whom may face production delays or price hikes based on regional or global market conditions. Additionally, silica and other minerals used in fibre cement production can be affected by mining regulations, import tariffs, and environmental policies, contributing further to cost instability. For manufacturers, this volatility in raw material prices poses significant challenges in maintaining profit margins. With the cost of production rising unpredictably, businesses may find it difficult to set stable prices, which can affect their competitiveness in the market. Companies may need to frequently adjust their pricing strategies, leading to customer dissatisfaction or loss of market share. Moreover, India's supply chain infrastructure still faces challenges, such as inadequate transportation systems in certain regions, delays in material delivery, and inconsistent quality of raw materials. These issues exacerbate the impact of rising raw material costs, further delaying production and increasing overhead costs. The complexity of sourcing raw materials from both domestic and international suppliers adds to the unpredictability, making it difficult for manufacturers to manage their operations efficiently.

To mitigate these risks, companies in the fibre cement market are increasingly looking for alternative materials or technologies to reduce their dependency on expensive raw materials. However, this requires significant investment in research and development, and the benefits are not immediate. Additionally, fostering strong relationships with reliable suppliers and improving local sourcing can provide some buffer against supply chain disruptions.

Environmental Regulations and Sustainability Challenges

The fibre cement boards and sheets industry in India is facing increasing pressure to comply with stringent environmental regulations and sustainability expectations. As global awareness of environmental issues rises, both consumers and regulatory bodies are demanding more eco-friendly products, which poses a challenge to the traditional production methods of fibre cement boards.

Fibre cement products, while more sustainable than traditional wood-based boards, still have a significant environmental footprint due to the energy-intensive manufacturing process. The production of cement itself is a major contributor to carbon emissions, and as a result, the fibre cement industry faces scrutiny for its environmental impact. In addition to this, the use of cellulose fibres sourced from trees, though renewable, may be criticized if the raw materials are not sourced sustainably. This growing focus on environmental sustainability requires manufacturers to reassess their sourcing practices and production methods to align with green building standards and regulations.

In India, the government has implemented several initiatives, such as the National Action Plan on Climate Change (NAPCC), to promote sustainable development. These include energy efficiency standards, waste management regulations, and stricter

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emissions controls. The construction sector, including the fibre cement industry, is now required to comply with these environmental laws, which can increase operational costs and necessitate investments in cleaner technologies. Moreover, the increasing adoption of eco-friendly building materials, such as bamboo-based panels or recycled content boards, poses a competitive challenge to the fibre cement market. Consumers, especially in urban areas, are increasingly preferring environmentally friendly products in line with global sustainability trends. Manufacturers of fibre cement boards must address this demand for greener alternatives while balancing cost-effectiveness and quality. Failure to adapt could result in the loss of market share to more sustainable products. Additionally, the disposal of fibre cement boards at the end of their lifecycle presents environmental challenges. While these boards are durable and low-maintenance, they can contribute to landfill waste if not properly recycled or repurposed. To tackle this, manufacturers need to explore recycling methods or develop products with a longer lifespan or biodegradability to align with sustainability standards.

To overcome these challenges, fibre cement manufacturers in India are increasingly investing in cleaner production technologies and sourcing sustainable materials. There is also a growing trend toward producing boards with reduced carbon footprints and utilizing waste materials, such as fly ash, in production. However, these advancements require significant investment in research and infrastructure, posing financial challenges for smaller companies within the industry.

Key Market Trends

Increasing Demand for Sustainable and Eco-Friendly Building Materials

The growing emphasis on sustainability and eco-friendly construction practices has emerged as a key trend in the India fibre cement boards and sheets market. As the country focuses on reducing its environmental footprint, consumers, builders, and regulatory authorities are becoming more inclined toward using sustainable alternatives to traditional construction materials. Fibre cement boards and sheets, which are made from a combination of cellulose fibres, cement, and silica, are increasingly gaining popularity due to their lower environmental impact compared to conventional building materials like wood, gypsum, and plasterboard. Fibre cement products are highly valued for their durability, long lifespan, and resistance to environmental factors such as moisture, termites, and fire. These qualities make them an ideal choice for eco-conscious builders who are looking for building materials that are not only durable but also pose minimal harm to the environment. The use of natural, recyclable raw materials in their production aligns with the growing demand for green building practices.

In India, the government's push for sustainable development through various initiatives like the Smart Cities Mission and the Pradhan Mantri Awas Yojana (PMAY) has accelerated the adoption of eco-friendly building materials. Fibre cement boards and sheets are often featured in the construction of low-cost housing, commercial spaces, and public infrastructure due to their affordability and sustainability. Additionally, green certifications and ratings, such as the Indian Green Building Council (IGBC) certification, further promote the use of these materials in green buildings. The increasing consumer awareness about environmental issues and the rising preference for energy-efficient homes are also driving this trend. Homeowners are seeking building materials that contribute to better insulation, reduce energy consumption, and improve indoor air quality. Fibre cement boards offer thermal insulation and moisture resistance, which contribute to overall energy efficiency, making them a suitable choice for sustainable construction.

The growing demand for eco-friendly building materials, coupled with government incentives and regulations promoting sustainable construction, is likely to fuel the continued expansion of the fibre cement boards and sheets market in India. This trend reflects a shift towards greener building solutions, which is expected to dominate the market in the coming years.

Rapid Growth of the Residential and Commercial Construction Sectors

Another significant trend driving the fibre cement boards and sheets market in India is the rapid growth of the residential and commercial construction sectors. As urbanization continues at a rapid pace, demand for housing, commercial buildings, and infrastructure is surging. This urban expansion is creating a need for innovative, cost-effective, and durable building materials, and fibre cement products are meeting these demands effectively. India's residential construction sector, fueled by increasing disposable incomes, urban migration, and government initiatives like the Pradhan Mantri Awas Yojana (PMAY), has experienced robust growth. The focus on affordable housing and the rise of middle-class homebuyers have led to an increase in demand for construction materials that offer both affordability and long-term performance. Fibre cement boards and sheets, with their cost-effectiveness and superior properties such as water resistance, fireproofing, and soundproofing, have become highly sought after for interior and exterior applications in residential buildings.

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In the commercial construction space, fibre cement boards are increasingly used for facades, partition walls, ceilings, and flooring due to their aesthetic appeal, light weight, and ease of installation. The rapid development of office spaces, retail buildings, and educational institutions in urban centers, especially in tier-1 and tier-2 cities, has significantly contributed to the growing demand for these products. Moreover, the rise of mixed-use developments and high-rise buildings in metropolitan areas is further boosting the adoption of fibre cement boards and sheets as ideal construction materials. The growing trend of modular and prefabricated construction, driven by the need for faster project completion and reduced labor costs, is also playing a role in the market expansion. Fibre cement products are well-suited for modular construction as they can be easily cut, shaped, and pre-assembled off-site, allowing for quick and efficient on-site installation. This trend aligns with the need for scalable, cost-effective solutions in the construction industry. Additionally, the commercial real estate boom, especially in sectors like hospitality, healthcare, and retail, is pushing the demand for durable and aesthetically appealing materials. Fibre cement boards, which offer a wide range of designs, finishes, and textures, are increasingly being used for interior and exterior cladding in commercial spaces. The ability of these boards to withstand harsh weather conditions and provide long-term protection against wear and tear is further cementing their place in the growing commercial construction sector.

As India continues to urbanize and develop both residential and commercial infrastructures, the demand for fibre cement boards and sheets is expected to remain strong. This trend highlights the growing reliance on durable, affordable, and versatile building materials in the rapidly expanding Indian construction industry. By 2031, around 40% of India's population is expected to live in urban areas, up from 34% in 2021, leading to a huge demand for residential construction. The demand for commercial office spaces has been on the rise, especially in Tier-1 cities like Bengaluru, Mumbai, Delhi NCR, Hyderabad, and Pune. In 2024, the commercial real estate market saw a net absorption of 44 million square feet of office space across major cities.

Segmental Insights

Application Insights

The Roofing segment dominated the India Fibre Cement Boards and Sheets market in 2024. The roofing segment dominated the India Fibre Cement Boards and Sheets Market due to its superior durability, cost-effectiveness, and versatility compared to traditional roofing materials. Fibre cement roofing sheets are highly resistant to extreme weather conditions, including heavy rains, strong winds, and intense heat, making them ideal for India's diverse climatic regions. Their fire-resistant and termite-proof properties add to their appeal, ensuring long-term performance and safety, which are critical for roofing applications.

The demand for fibre cement roofing sheets is further driven by the rapid urbanization and infrastructural development across the country. As urban areas expand, the need for affordable, durable, and low-maintenance roofing solutions increases. Fibre cement roofing sheets meet these requirements, making them a preferred choice for residential, commercial, and industrial buildings. Government initiatives aimed at providing affordable housing also contribute to the growth of this segment, as fibre cement roofing offers an economical and reliable solution for large-scale housing projects.

Technological advancements in manufacturing processes have enhanced the quality and aesthetic appeal of fibre cement roofing sheets. Innovations in design and production techniques enable the creation of roofing sheets that mimic the appearance of traditional materials like clay tiles and slate, catering to aesthetic preferences while offering the benefits of fibre cement. These advancements also lead to improved product performance and longer lifespan, further solidifying the dominance of the roofing segment in the market.

The replacement of asbestos-based roofing materials with fibre cement alternatives due to health and safety concerns has significantly boosted the market. Fibre cement roofing sheets provide a safer option without compromising on performance, driving their adoption in both new constructions and renovations. This shift towards safer and more sustainable roofing materials underscores the growing preference for fibre cement roofing sheets, reinforcing their leading position in the India Fibre Cement Boards and Sheets Market.

Regional Insights

West India emerged as the dominating region in 2024, West India has emerged as the dominating region in the India Fibre Cement Boards and Sheets Market, driven by a combination of robust industrialization, rapid urbanization, and significant infrastructural development. States like Maharashtra and Gujarat, which are economic powerhouses of the region, have witnessed substantial investments in both residential and commercial real estate sectors. The booming construction activities in these states have created a high demand for durable and versatile building materials, positioning fibre cement boards and sheets as the

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preferred choice due to their superior properties.

The region's dominance is further bolstered by the presence of major manufacturing hubs and ports, facilitating the efficient production and distribution of fibre cement products. The strategic location of West India enables easy access to raw materials and ensures streamlined supply chains, reducing production costs and improving market competitiveness. Additionally, the well-developed transportation infrastructure supports the swift movement of goods, ensuring timely delivery and availability of fibre cement boards and sheets across the region.

Government initiatives aimed at enhancing urban infrastructure and providing affordable housing have also played a crucial role in driving the demand for fibre cement products in West India. Projects like the Smart Cities Mission and Pradhan Mantri Awas Yojana are leading to the development of new urban areas and upgrading existing ones, requiring substantial quantities of construction materials. Fibre cement boards and sheets, with their cost-effectiveness and low maintenance, are ideal for these large-scale projects.

The region's growing emphasis on sustainable construction practices aligns with the eco-friendly nature of fibre cement products. Builders and developers in West India are increasingly adopting green building materials to meet regulatory standards and cater to environmentally conscious consumers. This trend enhances the appeal of fibre cement boards and sheets, known for their durability and minimal environmental impact.

West India's dominance in the India Fibre Cement Boards and Sheets Market is attributed to its rapid industrialization, strategic manufacturing and distribution advantages, supportive government initiatives, and a strong focus on sustainable construction practices. These factors collectively drive the high demand and widespread adoption of fibre cement products in the region, cementing its leading position in the market.

Key Market Players

- HIL Limited
- Visaka Industries Ltd. (VIL)
- Everest Industries Ltd.
- Ramco Industries Ltd.
- Sahyadri Industries Pvt. Ltd.
- Utkal Asbestos Ltd
- UP Asbestos Ltd. (UPAL)
- NCL Industries Limited

Report Scope:

In this report, the India Fibre Cement Boards and Sheets Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

□ India Fibre Cement Boards and Sheets Market, By Raw Material:

- o Asbestos
- o Non-Asbestos

□ India Fibre Cement Boards and Sheets Market, By Application:

- o Roofing
- o Siding
- o Cladding
- o Moulding & Trimming
- o Others

□ India Fibre Cement Boards and Sheets Market, By End Use:

- o Residential
- o Non-residential

□ India Fibre Cement Boards and Sheets Market, By Region:

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

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o East India

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the India Fibre Cement Boards and Sheets Market.

Available Customizations:

India Fibre Cement Boards and Sheets Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

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

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