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Rata - Newsletter

15th December 2016 | Issue 36

(For Private Circulation Only)

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Overview Of RATA

The Refrigeration & Air-Conditioning Trades Association Ltd. (RATA) is one of the oldest association working for the development of Air-Conditioning & Refrigeration industry in India. Established in the year 1949, the association brings together people from the entire industry and gives them a central forum to help them accomplish their common goal of making progress and achieving success.

To bring this vision to reality, RATA with its base of ethics and a strong code of conduct, actively and responsibly helps its members to grow and has also encouraged new entries for the expansion and betterment of the industry.

RATA believes in providing a platform to its members to showcase their offerings which in turn will promote internal as well as external trade. In this constantly evolving industry and changing market trends, the association contributes towards the promotion and an overall development of its members and the industry by encompassing companies and traders to organize promotional, educative and informative events.

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Mr. Jasprit Singh	H. J. International	Treasurer
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Mr. Rajen Bhimra	Bhimra Products	Action Committee
Mr Bhavesh Mehta	Mr Bhavesh Mehta	Action Committee

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Circulation: Monthly to every member randomly every quarter to non members reaching over 5000+ small and medium enterprises in the field of airconditioning and refrigeration.

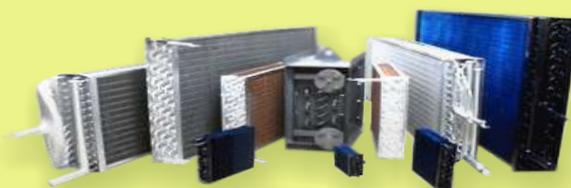
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Funding for MSME's

Source: CII Communique Sept 2016

The Micro, Small and Medium Enterprises (MSME) sector is extremely crucial for the growth of the Indian economy, making significant contributions to GDP, employment and exports. In spite of its crucial role in shaping the country's economic landscape, access to finance continues to threaten the vitality and viability of enterprises in this sector. CII's 2nd National Conference on MSME Funding, held on 23 August in New Delhi, had the theme of propelling MSME growth in India through enhanced financial access and support.

Mr. S. S. Mundra, Deputy Governor, Reserve Bank of India (RBI), highlighted the need to create a nurturing ecosystem for MSMEs, at the conference. This calls for eliminating recurring impediments, and providing enablers such as skilled manpower, infrastructure, technology, market linkages, etc, he said, stressing that the biggest enabler is access to finance.

The provision for credit, he said, is reliant on four pivotal issues, which he called the ABCD of Credit, her 'A' stands for Access and Availability, and entails the low access of MSMEs to formal sources of finance, and the inadequate of banking outlets, inspite of over 3000 specialized branches of public sector banks dedicated to lending to MSMEs, and innovative products and processes by private banks, 'B' refers to the information asymmetry between banks and businesses. There is an acute lack of financial literacy amongst MSMEs, and banks lack the empathy and training to deal with them. 'C' stand for collateral requirements, and 'D' signifies inadequate documentation to match the rigors of a formal financial system, he elaborated.

Dwelling on the steps taken by RBI and the Government in addressing these issues, Mr. Mundra said that, regarding Access and Availability, two new universal banks have started operations while in-principle approval has been granted to 10 entities to set up small finance banks mandated to extend 75% of their Adjusted Net Bank Credit (ANBC) to sectors eligible under priority sector lending. Additionally, the RBI has advised banks to set up brick and mortar branches in villages with a population of more than 5000, while public sector banks have established specialized MSME branches in every district.

New concepts such as P2P lending have the potential to transform the MSME funding landscape, he said, adding that the RBI has advised banks to make a provision for additional credit limits as well as to carry out mid-term review of regular working capital limits and fix up timelines for credit decisions.

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Funding for MSME's

Source: CII Communique Sept 2016

He also stressed on the importance of co-origination of loans by banks, non-banking financial corporation of loans by banks, non – banking financial corporations and micro finance institutions with risk participation, since these institutions have a better understanding of the working of MSMEs.

In order to bridge the information asymmetry, the RBI, said the Deputy Governor, has started a national mission for capacity-building of bankers for financing the MSME sector. Almost 3,300 banking officials have undergone training under this program in the last one year. The RBI is also putting in place a framework for the accreditation of credit counsellors for MSMEs and has issued guidelines on the Framework on Revival and Rehabilitation of MSMEs, he said.

Initiatives have been undertaken to deal with collateral requirements for MSMEs, and to address the problem of delayed payments. The RBI has also advised banks not to insist on collateral. The Credit Guarantee Fund Trust for Micro and Small Enterprise has been set up to encourage member lending institutions to extend credit based on the viability of proposals instead of security, he stated. Finally, to simplify cumbersome documentation requirements, the Udyami Mitra Portal has been set by SIDBI, which leverages technology to provide end-to-end solutions in credit delivery and beyond.

The RBI Deputy Governor urged industry associations to enhance the linkages between banks and MSMEs, and to spread awareness about the measure being undertaken by the Government and other bodies.

Mr. Mundra launched the CII MSME Compliances and Advisory Service, which has been introduced by the CII Finance Facilitation Cell (FFC) to assist MSMEs fulfil their compliance requirements, and to provide them with advisory support on compliance management. He also released a report drafted by CII, in partnership with CRISIL, on MSME Ratings in India.

MSME RATINGS: STAIRWAY TO FUNDING:

CII, in partnership with CRISIL, has come out with a special report on MSME Ratings. The report, titled 'Stairway to Funding: Improving MSME Access to Institutional Credit through Ratings', was released by Mr. S. S. Mundra, Deputy Governor, RBI, at the 2nd National Conference on MSME Funding.

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Funding for MSME's

Source: CII Communique Sept 2016

Ratings have a key role to play in shaping the future of MSMEs, yet they cover a meagre 0.25% of the overall MSMEs in India, due to the low level of awareness.

The report discusses the evolution of various ratings products in India, the need and benefits of ratings for MSMEs, distinguishing features between ratings for large enterprises and MSMEs, some best practices adopted by high-rated MSMEs, and strategies for MSMEs to enhance their ratings. The report also provides an overview of the performance and credit rating scheme launched by the Ministry of MSME in 2005, which is being implemented by the National Small Industries Corporation.

Poor access to institutional funding is a pervasive concern for MSMEs. This can be attributed to factors such as lack of reliable background information, low awareness about standard accounting practices, delayed payments, high risk perception of banks and other lending institutions, and difficulty in credit risk assessment and creditworthiness, among others.

According to the report, credit ratings provide several tangible and intangible benefits to various stakeholders. Credit ratings can boost financial discipline, disclosure and governance practices among MSMEs, thereby reducing the risk perceived by lenders in lending to them. Good ratings enhance the acceptability of the rated units in the market and provide them access to quicker and cheaper credit. Ratings also benchmark MSMEs with their counterparts, and can be a useful marketing tool for these companies to enhance their visibility and credibility and reach out to a larger stakeholder base. The challenge lies in bringing in uniformity in the credit rating parameters being used by various ratings agencies, launching outreach initiatives, and educating the MSME sector on the benefits of ratings.

For banks and lending agencies, says the report, the benefits of credit ratings include better risk assessment, due diligence by third parties, more efficient monitoring and assessment of their credit portfolios, improvement in the quality of assets, etc.

Several distinguishing features and best practices are responsible for the success of high-rated MSMEs, says the report. These include the presence of experienced promoters, a reliable, efficient and empowered second-tier management with significant decision-making authority, a diversified product and customer base, healthy stakeholder relationships, deployment of latest technology, access to sound infrastructural facilities, strong accounting and reporting standards, and regular quality and performance assessments.

Some of the suggestions outlined by the report for MSMEs to improve their ratings include sharing credible and adequate information with rating agencies, promoting a sound organizational structure, enhanced diversification for risk mitigation, healthy cash conversion cycles, adoption of good human resource development practices, adoption of business practices to boost the productivity of the business and its employees, improving key leverage ratios, and timely discharge of compliances and other legal obligations.



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Funding for MSME's

Source: CII Communique Sept 2016

PUBLIC PROCUREMENT POLICY FOR MSME

The lack of adequate market linkages is a major roadblock for Indian Micro, Small and Medium Enterprises (MSMEs). For such companies, robust supply relationships with larger enterprises present a significant opportunity for development, leading to larger and more consistent orders, and incentivize them to improve their operations to meet stricter requirements in terms of quality, on-time delivery, cost reduction and customer service. For large companies, working with smaller, local suppliers presents an excellent opportunity to reduce lead times, inventories and logistics costs. For the country, the replacement of imported inputs with locally produced inputs increases national value-addition, boosts local communities, and promotes indigenization.

The Ministry of MSME has notified the implementation of the Public Procurement Policy from 1 April 2012, which calls for achieving an overall procurement of minimum 20% of total annual purchases of products produced or services rendered by MSMEs within a period of 3 years, by central ministries, government departments and Public Sector Undertakings (PSUs). Mandatory from 1 April 2015, the policy has also earmarked a sub-target of 4% procurement of goods & services, out of the 20% from MSMEs owned by SC/ST entrepreneurs.

However, the policy has not been able to generate the desired results, due to a host of factors, constraining MSMEs. These include a weak institutional framework, poor understanding of the customer's requirements, inability to meet customer needs, unattainable quality and technological standards, low incidence of registered MSMEs, difficulty in abiding by the tender documentation processes due to lack of standardization and exposure, general perception of low quality owing to the size and nature of small supplier firms, and lack of appropriate feedback and grievance redressal mechanisms.

CII organized a Policy Dialogue Session on the Public Procurement Policy for MSMEs in India on 12 August in New Delhi, to enhance awareness about the policy, identify the key factors responsible for its limited impact, and suggest strategies to the Government for its successful implementation. The session was addressed by government officials and experts including Mr. S. Chawla, Director, Office of Development Commissioner, Ministry of MSME; Mr. A K Mittal, Chief General Manager, NSIC Ltd, And Mr. Shankar Kumar, Technical Advisor, GIZ.

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Source: CII Communique Sept 2016

Representatives of some of the most prominent PSU's in the country, including the Airports Authority of India, ONGC, SAIL, Cochin Shipyard Ltd, Shipyard Ltd, PTC India Ltd, NTPC Ltd, TCIL, Bharat Petroleum Corporation Ltd, RITES Ltd, Engineers India Ltd, and Power Grid Corporation Ltd, also joined the session.

The discussions highlighted the need for a strong and coordinated mechanism between the Ministry of MSME and other stakeholders to deal with bottlenecks and hurdles, and ensure the success of the policy. Suggestions to the Ministry included encouraging regular interactions between PSUs and MSMEs, and leveraging various technology platforms to enhance the effectiveness of the policy. The PSUs were urged to undertake steps such as simplification and standardization of the vendor registration process and tender documentation, expedite payments to MSMEs, conduct vendor development programs, etc.

MSMEs, on their part, can enhance their procurement by PSUs by adopting best practices such as getting themselves registered; implementing a transparent accounting system, engaging in quality enhancement, and participating in vendor development programs, etc. said the experts.

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‘Risk Assessment of Mildly Flammable Refrigerants for Proper Utilization’

In the air conditioning and refrigeration (AC&R) industry, a shift from the existing types of refrigerants to next-generation types of refrigerants with low global warming potentials (GWPs) must be implemented as soon as possible. However, since many of the next-generation types of refrigerants are mildly flammable, they must be subjected to risk-assessment based on scientific findings.

Responding to this situation, the New Energy and Industrial Technology Development Organization (NEDO) launched a project called 'Technology Development of High-efficiency Non-fluorinated Air-conditioning Engineers (JSRAE) created a Research Committee on Risk Assessment of Mildly Flammable Refrigerants, and the Japan Refrigeration and Air Conditioning Industry Association (JRAIA) set up a working group that performs risk assessment for each product category including room air conditioners (RACs), packaged air conditioners (PACs), variable refrigerant flow (VRF) systems, and chillers.

Additionally, JRAIA and JSRAE have set up a risk assessment deliberation system based on government, industry, and university collaboration including the University of Tokyo that participated in the NEDO project, and submitted a report on the results of risk assessment of R32, R1234yf, and R1234ze(E) by March 2016.

In September, the 'Risk Assessment of Mildly Flammable Refrigerants for Proper Utilization' won the Minister Prize of Economy, Trade and Industry, which is the highest honor among the 19th Ozone Layer Protection and Global Warming Prevention Awards in Japan, since it was recognized that this project formulated highly valuable safety measures, an industry standard and a guideline for mildly flammable (A2L) refrigerants based on government, industry, and university collaboration.

In this project, methods for measuring various flammability characteristics of refrigerants were established, and various types of data such as the frequency of occurrence of a flammable volume when refrigerants leaked indoors or outdoors were collected. As a result of trial calculation of the fire breakout probability for each accident scenario, i.e. during air conditioner transportation, installation, and use, the fire breakout probability in all scenarios was demonstrated to be below the allowable probability. Thus, it was confirmed that R32, R1234yf, and R1234ze(E) can be used safely. However, since it was found that there is a probable risk in certain large products or installation spaces, additional countermeasures were developed, such as driving a fan in the indoor unit when a leak has been detected in order to reduce the concentration of leaked refrigerant gas by agitating it indoors, and industry guidelines were formulated for respective product categories.

Since there had been no regulations concerning mildly flammable refrigerants in the refrigeration Safety Regulation that stipulates the safety of refrigerant use, charge, collection/recovery, transport, and storage, and also in the High Pressure Gas Safety, mildly flammable refrigerants have been subjected to severe regulations as in the case of strongly flammable hydro-carbon refrigerants. However, reflecting the results of risk assessment publicized this time, it has been decided that regulation on mildly flammable refrigerants should be positioned as a type of inert gas provided that measures be taken to prevent the refrigerant from remaining during leakage etc.

At present, in the Japanese market, R32 is adopted in RACs and PACs. Due to the relaxation of regulations under the High Pressure Gas Safety Act, it has become possible to use R32 in VRF systems from now on. If VRF systems adopting R32 emerge, the Japanese market will exert a great impact on global scale. While the timing of the launching of R32 VRF systems in to the market depends upon each manufacturer's decision, since legal proceedings have been completed to a large extent, they are ready for shipment.

LATEST REFRIGERANT – RELATED ACTIVITIES IN JAPAN

Source : JARN

Tetsuji Okada, president of JRAIA, stressed the strengthening of information dissemination capability abroad as one of the global strategies Japan should implement. The relaxation of the regulation thanks to the current project is surely an example of information to be publicized overseas. Venues for such information dissemination are overseas expositions and international conferences.

At the Chillventa exhibition held in October in Nuremberg, Germany, Mr. Okada made a presentation titled 'Implementation of Alternative Refrigerant Management in Japan – Latest Activities for Safety.' In this presentation. He explained the background behind the choice of A2L refrigerant by Japanese manufacturers as an alternative for air conditioning products to facilitate the prevention of global warming. The latest activities in Japan include the Japanese government's policy and legislation for safer use, side by side with projects conducting risk assessment. JRAIA also emphasized the key factors which must be taken into account when other countries also adopt similar steps of risk assessment of mildly flammable refrigerants.

In reply to JARN's interview, Mr. Okada gave the following insight. "ahead of other countries in the world, JRAIA is proceeding with various activities toward the prevention of global warming. At the same time, we are attaching importance to safety as one of the aims to which top priority should be given. To realize this, JRAIA regards it an important mission to promote safety-guaranteed products by strictly checking the safety when using flammable refrigerants by performing risk assessments."

Through joint government, industry, and university collaboration, Japan is resolved to deploy products by emphasizing not only advanced technologies but also top-level safety.



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The Latest Trends of the Global R32 AC Market

Source : JARN

Major Market Trends

Taiwan

All types of R22 air conditioners have been prohibited since January 2015, and the market has already sifted to R410A. Daikin started import and sales of R32 splits from the 2015 sales season, and major local manufacturer TECO followed Daikin with local production of R32 splits from this sales season.

Australia

The percentage of window units in the Australian room air conditioner (RAC) market fell to about 7%, which almost entirely replacement demand, import and production of R22 air conditioner were prohibited in Australia from July 2010, and the market has already shifted to R410.

Fujitsu General Stated sales of R 32 RACs in September 2013, and Daikin followed from early 2014. Local manufacturer Kelvinator launched R32 window and split type RACs supplied by Gree on an OEM basis. In the second half of 2015, Panasonic and Mitsubishi Electric also followed. In October 2015, Fujitsu General launched R32 cassette type packaged air conditioners (PACs) to the Australian commercial market.

India

The government has a policy to gradually phase down R22 air conditioner by 2020 based on the Montreal Protocol and the percentage of R22 units still occupies roughly 70% of the split type RAC market. Meanwhile, the percentage of window units in the Indian RAC market fell to 19% in the rapid shift of the RAC market to split type.

Daikin launched production of R32 splits at it Neemnara factory and test marketing from March 2013 and then full-scale sales from early 2014. Fujitsu General and Mitsubishi Electric started sales of R32 RACs imported from Thailand. Major local manufacturer Blue Star, which concluded a contract concerning the R32 patents with Daikin, launched local production of R32 splits around the middle of 2015.

Europe

R22 air conditioner are prohibited in the EU and surrounding countries, and the market has already shifted to R410A. The EU has established a target for 2030 to gradually reduce the HFC consumption volume 79% compared with 2015 results.

The Latest Trends of the Global R32 AC Market

Source : JARN

From January 2015, the annual sales volume of HFC is subject to the allocation system for manufacturers and importers within the EU.

From early 2014, Daikin launched test marketing of R32 RACs supplied mainly by its Czech factory in the EU and surrounding countries including Russia and Turkey. The company started full-scale sales from early 2016 after expanding its R32 product portfolio including multi systems. Panasonic started sales of R32 RACs in Nordic countries from fall 2015 and then in Southern Europe from this sales season.

At the Italian HVAC expo Mostra Convegno Expocomfort (MCE) 2016 held last March, Toshiba, Mitsubishi, Electric, Haier, Gree, Midea, Hisense, and other manufacturers exhibited R32 RACs in addition to Daikin and Panasonic, but only Panasonic, Toshiba, and Haier have started actual sales of R32 RACs in Europe.

In particular, the Italian market has recovered rapidly thanks to a heat wave in the 2015 summer, and RAC demand this year is expected to increase by more than 30% compared with the previous year. Expansion of RAC demand helped to get sales of R32 units on track in Italy. The percentage of R32 units is reported to occupy one-quarter of the Italian RAC market.

United States

The U.S. Environmental Protection Agency (EOA) has approved additional low-GWP mildly flammable R32 refrigerant in self-contained type air-conditioners with refrigerant charge volume of less than 7.8 kg. Accordingly, Goodman (Daikin) has a plan to start local production and sales of packaged terminal air conditioners (PTACs) using R32 this October.

Last May, the local manufacturer Friedrich launched sales in the United States of R32 window and thru-the-wall type units that are supplied by LG on an OEM basis.

At this stage, there are large regional disparities concerning R32 air conditioner, since some governments actively promote a shift to R32 units, while some other governments still consider R32 units as products to be restricted. According to an improvement of market infrastructure for introducing the R32 units, wider expansion in sales areas and product range may be expected in the future.

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