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INDIAN WOOD & ALLIED PANELS

Volume 19 • Issue 3 A Quarterly Journal on Plywood and Panel Industry July - September 2025

FIPPI Delegation meeting Hon'ble Minister of Commerce and Industry Shri Piyush Goyal for the Reconstitution of Development Council for Plywood and other Panel Products .....page 7


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INDIAN WOOD & ALLIED PANELS

A Quarterly Journal on Plywood and Panel Industry

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CONTENTS

July - September 2025

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FIPPI Delegation meeting Hon'ble Minister of Commerce and Industry Shri Piyush Goyal for the Reconstitution of Development Council for Plywood and other Panel Products

The plywood and panel industry in India holds immense potential to meet the country's demands and contribute meaningfully to the vision of Atmanirbhar Bharat. As the industry transitions into a phase of substantial growth, driven by the implementation of Quality Control Orders (QCOs), increasing demand for sustainable building materials, and rising focus on agroforestry and green infrastructure, a dedicated institutional forum to take up the issues of the industry with the Government is required for the smooth and speedy development of the plywood and panel industry.

FIPPI continues to play a pivotal role in policy-making forums as the voice of India's plywood and panel industry. As part of its advocacy efforts, FIPPI has been working on the reconstitution of the Development Council for the plywood and panel industry under Section 6 of the industries (Development & Regulation) Act, 1951.

In this regard, a delegation from FIPPI met the Hon'ble Minister of Commerce & Industry Shri Piyush Goyal Ji on Thursday, 10th July 2025 at 3:30 PM (IST) in the Honourable Minister's Chamber, New Delhi, to submit their representation regarding the reconstitution of the Development Council for the plywood and panel sector. The proposed council is envisioned to drive inter-ministerial coordination, address raw material challenges, promote innovation, foster skill development and unlock the sector's export potential. The delegation included:

1. Chief Patron: Sajjan Bhajanka (Chairman, Century Plyboards India Ltd.) (PadamShri Awardee)
2. Patron: Shri N.K. Aggarwal (CMD, Action Tesa Buildwell Pvt. Ltd.)
3. President: Shri Rajesh Mittal (CMD, Greenply Industries Ltd.)
4. Senior Vice President: Shri Jaydeep Chitlangia, (Mentor, Duroply Industries Ltd.)
5. Vice President: Shri Keshav Bhajanka (Executive Director, Century Plyboards India Ltd.)
6. Director General: Dr M.P. Singh (IFS, Retd)
7. Shri Krupesh Thakkar (CMD, Rushil Décor)
8. Shri Madhusudan Lohia (Director, Merino Industries Ltd.)
9. Vice President: Shri Jikesh Thakkar, (Vice President, Rushil Décor)
10. Affiliated Association: Shri Sandeep Aggarwal (UK-UP Ply Association)
11. Affiliated Association: Dr. Prashanth M., (President, The South Indian Plywood Manufacturers Association, SIPMA)
12. Affiliated Association: Shri Ramesh Agarwal (President, Association of Indian Plywood and Laminate Industries, AIPLI)

The Hon'ble Minister of Commerce & Industry assured the delegation that the demand would be looked into with appropriate attention.❑

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

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FIPPI/80/3-2025 July 10, 2025

To,
Shri Piyush Goyal
Hon'ble Minister of Commerce & Industry
Government of India
Udyog Bhawan
New Delhi-110011.

Subject: Request for Reconstitution of the Development Council for Plywood and other Panel Products Industry under the Industries (Development & Regulation) Act. 1951.

Respected Sir,

On behalf of the Federation of Indian Plywood & Panel Industry (FIPPI), we would like to submit this representation requesting the reconstitution of the Development Council for Plywood and other Panel Products Industry under Section 6 of the industries (Development & Regulation) Act, 1951.

Today, the Indian Plywood & Panel Industry consists of around 3,300 units (small, medium and large units), supporting around 3.5 million people. Out of these 3.300 units, nearly 3,200 units are in the un-organized sector. The market size for Indian plywood and panel industry was valued at approximately INR 27,000 crore in 2022-23, recording a robust Compound Annual Growth Rate (CAGR) of 14.2% between 2018 and 2023 (Source: Annual Survey of Industries, ASI).

This industry holds immense potential to meet the country's demands and contribute meaningfully to the vision of **Atmanirbhar Bharat**. As the industry transitions into a phase of substantial growth, driven by the implementation of Quality Control Orders (QCOs), increasing demand for sustainable building materials, and rising focus on agroforestry and green infrastructure, a dedicated institutional forum to take up the issues of the industry with the Government is required for the smooth and speedy development of the plywood and panel industry.

The implementation of Quality Control Orders (QCOs) marks a pivotal shift for the plywood and panel sector, with significant short- and long-term benefits. In the short term, the QCOs are expected to boost domestic production by reducing reliance on imported plywood and panel products while encouraging domestic manufacturers to upgrade processes and deliver high-quality, standardized products. This shift will boost employment opportunities, and the resulting increase in demand for raw materials will further promote tree cultivation, enhancing the country's green cover. India must adopt a robust policy framework to unlock its vast potential in agroforestry and sustainable timber production. By selectively adopting progressive elements of

China's policy model, India is well-positioned to become the second-largest manufacturing hub of agroforestry-based wood products globally in near future.

In the long term, the QCO regime will strengthen India's position in the global market, unlock export potential, and encourage sustainable practices and innovation across the value chain. However, for the QCO implementation to be truly effective, it must be backed by a robust institutional mechanism that can facilitate inter-ministerial coordination, monitor QCO compliance, and provide technical and policy support to manufacturers and farmers alike. This strongly highlights the need for the reconstitution of the Development Council for this sector which can provide the following benefits to the plywood, panel, and furniture sector:

1. **Facilitate inter-ministerial coordination** between MoEF&CC, Ministry of Agriculture, and DPIIT to align timber and agroforestry policies.
2. **Address key industry challenges** including raw material scarcity, climate change, carbon sequestration, and the need for innovation and R&D.
3. **Support QCO implementation and monitoring** to ensure compliance and quality across the sector.
4. **Promote innovation, product development, and workforce skilling,** while building forward linkages with furniture sector and backward linkages with farmers engaged in agroforestry.
5. **Provide a common platform** for stakeholder consultation and resolution of industry issues.
6. **Boost employment and rural livelihoods** by integrating agroforestry into national and state development plans.
7. **Reduce dependence on imports** valued at 23500 crores for plywood and panel products, strengthening domestic supply chains and advancing self-reliance. If imports stop and that plywood demand is fulfilled through the domestic production, it will provide employment to additional 8.75 lakhs people (0.8 million).
8. **Include furniture sector representation** to resolve regulatory and supply chain issues, enhancing competitiveness and global integration.

In the past, the Government of India had graciously constituted the Development Council for Plywood and Other Panel Products Industry in November 1993 under Section 6 of the industries (Development and Regulation) Act, 1951, for a tenure of two years.

During this period, three meetings were held, and multiple sub-committees were formed which undertook substantive work, including promoting plantation on degraded land, studying rationalization of duties, and formulation of export strategies. Proceedings of these meetings are annexed as **Annexure 1, 2 and 3** and the report on the progress of work done submitted by the Development Council during its tenure from 19.11.1993 to 18.11.1995 is enclosed as **Annexure 4** for kind reference illustrating the nature of the work done by the council.

Following the expiration of the initial term and considering the significant work carried out by the Council, it was reconstituted in October 1996 for another term of two years. A copy of the Gazette Notification dated 6th October 1996, constituting the Development Council for Plywood and other Panel Products Industry including the appointed members of the Council for the Scheduled Industries engaged in the manufacture of Plywood and other Panel Products is enclosed as **Annexure 5**. One meeting was held on in February 1997 following the Supreme Court judgement in the Godavarman vs. Union of India case. Minutes of the reconstituted Development Council held on 12.02.1997 in New Delhi is enclosed as **Annexure 6**. However, the tenure of the reconstituted Council ended in October 1998, and since then, the Council has not been revived. The non-revival of the Development Council after 1998 led to the absence of an institutional platform to represent the industry's concerns, resulting in fragmented communication, delayed policy interventions, and a lack of coordinated support from relevant ministries, impeding the industry's ability to respond effectively to evolving challenges and opportunities. A note justifying the need to establish the Development Council for the Plywood and other Panel Products Industry and its benefits to the industry is enclosed as **Annexure 7**.

The Federation of Indian Plywood and Panel Industry (FIPPI) sincerely requests you to consider the proposal for the reconstitution of the Development Council, and we would be pleased to provide any further information or support to facilitate the process.

Yours sincerely,

Rajesh Mittal
President
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

List of the supporting documents for the reconstitution of the Development Council:

1. **Annexure 1:** Minutes of the 1st meeting of the Development Council held on 23.9.1994 in Delhi (Annexure 4).
2. **Annexure 2:** Minutes of the 2nd meeting of the Development Council held on 18.1.1995 in New Delhi.
3. **Annexure 3:** Minutes of the 3rd meeting of the Development Council held on 27.10.1995 in Calcutta.
4. **Annexure 4:** Progress of work done by the Development Council for Plywood and Other Panel Products Industry during its tenure from 19.11.1993 to 18.11.1995.
5. **Annexure 5:** Copy of the Gazette Notification of the Development Council for Plywood and other Panel Products Industry.
6. **Annexure 6:** Minutes of the reconstituted Development Council held on 12.02.1997 in New Delhi.
7. **Annexure 7:** A note justifying the need to establish the Development Council for the Plywood and other Panel Products Industry.

Annexure 1

Minutes of the first meeting of the Development Council for Plywood and Other Panel Products Industry held at New Delhi on 23/09/1994.

1. The First Meeting of the Development Council for Plywood and other Panel Products Industry was held at New Delhi on 23rd September 1994 under the Chairmanship of Shri S.P. Goenka. The meeting was inaugurated by Smt. Krishna Sahi, Hon'ble Minister of State for Industrial Development. Chairman of the Development Council, the Members of the Council are grateful to her for the same. The list of Members and special invitees present in the meeting is annexed herewith.

2. At the outset, Joint Secretary, Ministry of Industry, Smt. Pratibha Karan, extended a very warm welcome on behalf of the Development Council and its Members. She expressed gratitude to Hon'ble Minister for sparing her valuable time to be with us and inaugurate the Meeting. She informed the Members that manufacture of plywood and other panel products is a very important activity, and it has assumed added significance as the industry is directly linked with Wood and Agricultural Residues as the Raw-Material. In the latest policy of liberalisation, manufacturing activity based only on wood requires licence. The entrepreneurs are free to manufacture products based on Agricultural Residues. On account of ecological balance and to preserve environment, forest etc., Development Council is the right forum to reflect the real problems of the industry.

3. In the inaugural speech of Hon'ble Minister Smt. Krishna Sahi, she said that Plywood and other Panel Products play a very significant role in our Economy as these are used for important activities like Housing, Construction etc. Keeping in view the importance of this sector, Government has felt it necessary to constitute a full-fledged Development Council where all problems relating to this sector of the industry could be discussed in greater depth. She felt that the Council should have a detailed discussion on Plantation aspect and try to find a permanent solution by which the industry not only meets its own requirement, but the Forest cover of the Country also increases. Industry should grow its own timber with the help of farmers and the forest department. Simultaneously the Industry should give a thought to manufacture new products based on Agricultural Residues as Raw Material. Industry should fully utilise Research Laboratories at Dehra Dun ana Bangalore for improving their quality. She pointed out that she is glad to know that Export has increased from is. 25 crores in 1992-93 to Rs.145 crores in 1993-94 and she hopes that the industry will keep up this tempo and increase Exports to at least Rs.200 crores in this financial year.

4. After introduction of individual Members, the Chairman Shri S.P. Goenka once again expressed gratefulness to Smt. Krishna Sahi for inaugurating the Meeting. He specifically thanked her for sparing the valuable time from her busy schedule for the First Meeting of the Council. He also thanked all the Members and the invitees who had made it possible to come from far off places for attending the Meeting. He emphasised that Development Council has before it very formidable task and hoped that the Development Council will be able to fulfil it with full satisfaction of the Government. From the overall attendance, one can judge keen interest taken by different Members and Invitees in activities of the Council. The Chairman on his part also highlighted some common problems of the industry to be

gone into thorough details while deliberating the discussion. The Chairman then requested Members and invitees to give the views on the problems faced by Industry so that the same can be taken up by the Council.

5. Shri Bishnu Prasad, Ex-M.P., Shri Banwari Ram, Ex-MLA, Shri Jitendra Manjhi, Shri P.D. Mayee, Dr. P.M. Ganapathy, Shri J. Venkatraman, Shri Jalan, Shri Khaitan etc. expressed their opinion on different subjects. Shri Bishnu Prasad pointed out that the Council has been constituted in November 1993 and the Meeting has been called in September 1994 i.e. after a period of ten months. The Meeting should be called quite often so that the problems of the industry could be discussed in depth. Shri Manjhi pointed out that some reports have been prepared earlier and copies of the same should be made available to the Members so that they can have a clear picture about the industry. Shri Jalan emphasised that the Council should concentrate on Plantation aspect as this is one of the very live problems of the industry. Shri Khaitan suggested that the Council should go into the depth regarding fiscal measures Shri Mavee of Ilanning available i.e. Customs, Excise, etc. Commission also desired that copies of earlier reports should be made available for study.

6. After hearing the views of the Members present, the Chairman expressed that members views will be kept in view in future and meetings will be held quite often.

7. The Chairman then requested Shri Mehta of Federation of Indian Plywood & Farel Industry to throw some light on the earlier reports and its recommendations. Shri Mehta informed the Committee that Development Panel was constituted as early as 1984 and renewed every two years up to 1990. Few reports have been prepared and after getting it adopted by the Development Panel, the summary of recommendation was sent to Ministry of Industry for action. The important reports are on Plywood, Particleboard, Hardboard and Raw Material for all these Industries. The fifth report has been Advantages/Dis-advantages of Wood/Re-constituted Wood vis-a-vis Aluminium, Plastic & Steel, He felt that if the Chairman so desired, these reports would be circulated to all Members for their information. The Chairman at this stage requested Shri Mehta to get copies of these reports and circulate to all members on his behalf. The Members expressed gratitude to the Chairman and desired to have further discussion on the work to be taken up by the Development Council.

8. The Chairman then pointed out that he has already divided the problems in different categories and he suggested that each problem should be "discussed in detail's and constitute Sub-Committees so that its recommendations can be taken up with the Government for appropriate actions. The Chairman also pointed out the specific problem of Transport Subsidy in very remote and industrially backward areas. The Federation requested the Chairman to take up this issue in the Development Council. Chairman informed the Members that this is a very serious problem arise hampering the growth of the Industry in Industrially backward areas. After some discussion, the Chairman informed the Members that as requested by Federation, he is taking up the matter with the Hon'ble Minister today itself along with the delegation from the industry. As we would like to have the Meetings quite often, we may take up few issues and try to prepare reports as early as possible so that the same can be discussed in the next meeting. After detailed discussions, it was decided to constitute the Sub-Committees for preparing reports on an immediate basis.

I. (a) SUPPORT PLANTATION ON WASTELAND AND DEGRADED FOREST AREAS.

(b) ENCOURAGE FARMERS TO USE THEIR DEGRADED LAND FOR TREE PLANTATION.

II. STUDY RATIONALIZATION OF DUTIES BASED ON FREE MARKET ECONOMY.

III. EXPORT PROJECTION FOR NEXT FIVE YEARS AND PAYS AND MEANS TO ACHIEVE THE SAME

IV. COMPARATIVE BENEFI28 TO THE NATION BY USING PANEL PRODUCTS IN LOW-COST HOUSING AND CONSTRUCTION, THE STUDY WILL COVER ENVIRONMENTAL BENEFITS, COST EFFECTIVENESS, POWER EFFICIENCY AND EMPLOYMENT GENERATION IN RURAL AREAS.

9. The First Committee would be headed by Shri M.M. Jalan as Chairman, Second Shri Harish Khaitan as Chairman, Third Shri S.P. Goenka as Chairman and Fourth also as Shri S.P. Goemka as Chairman. The detailed Composition of the Sub-Committee is as follows.

I. (a) SUPPORT PLANTATION ON WASTELAND AND DEGRADED FOREST AREAS.

(b) ENCOURAGE FARMERS TO USE THEIR DEGRADED LAND FOR TREE PLANTATION.

Sari M.M. Jalan, Calcutta	Chairman
Shri Bishnu Prasad, Ex-M.P., B/3, Pandara Road, New Delhi-110003	Member
Dr. P.M. Ganapathy, Director, IPIRTI, Bangalore	Member
Shri S.P. Goenka, Calcutta	Member
Shri A.C. Chaubey, DIG(SU), New Delhi	Member
Shri J.R. Manjhi, AT-Godavari P.O. Chand Chora, Dist. Goya, Bihar-823 001	Member
Shri P.D. Mayee, Joint Adviser (Industry & Mineral Division), Planning Commission, Yojana Bhawan, Sansad Marg, New Delhi-110 001	Member
Dr. D.N. Tewari, Director General, ICFRE, Dehra Dun	Member
Shri P.V. Mehta, Executive Director, FIPPI, New Delhi	Member

II. STUDY RATIONALIZATION OF DUTIES BASED ON FREE MARKET ECONOMY.

Shri Harish Khaitan, Calcutta	Chairman
Shri Bishnu Prasad, Ex-M.P., B/13, Pandara Road, New Delhi-110 003	Member
Shri M.M. Jalan, Calcutta	Member
Shri P.D. Mayee, Joint Adviser (Industry & Mineral Division), Planning Commission, Yojana Bhavan, Sansad Marg, New Delhi-110 001	Member
Shri H.V. Sarda, Calcutta Shri Harish Khaitan, Chairman may Co-opt other Members/Invitees as Members of the Sub-Committee.	Member

III. EXPORT PROJECTION FOR NEXT FIVE YEARS AND WAYS AND MEANS TO ACHIEVE THE SAME,

Shri S.P. Goenka, Calcutta	Chairman
Shri Arun Barar, New Delhi	Member
Shri H.V. Sarda, Calcutta	Member
Shri Sajjan Bhajanka, Calcutta	Member
Shri Kamal Somani, Vice-President (Finance), M/s. Kitply Industries Ltd., 'White House', 119 Park Street, Calcutta-700 016	Member
Shri Shaish Kumar, New Delhi	Member

IV. COMPARATIVE BENEFITS TO THE NATION BY USING PANEL PRODUCTS IN LOW-COST HOUSING AND CONSTRUCTION, THE STUDY WILL COVER ENVIRONMENTAL BENEFITS, COST EFFECTIVENESS, POWER EFFICIENCY AND EMPLOYMENT GENERATION IN RURAL AREAS.

Shri S.F. Goenka, Calcutta	Chairman
Shri Banwari Ram, Ex-MLA, Mohalla Harishchandra, Talab Stadium Road, Navada, P.O. Navada (Bihar)	Member
Shri M.N. Jalan, Calcutta	Member
Shri S.K. Taneja, Deputy Chief (Building Materials), Housing & Urban Development Corporation Ltd., Hudco House, Lodhi Road, New Delhi-110 003	Member
Dr. P.M. Ganapathy, Director, IPIRTI, Bangalore	Member
Shri J. Venkatraman, Bureau of Indian Standard, New Delhi	Member
Shri P.V. Mehta, Executive Director, FIPPI, New Delhi	Member

10. Suggestions were received for including some Members to assist the Chairman which were widely welcomed. The composition of the Sub-Committee has also been finalized. Chairman of the Sub-Committee may even Co-opt any more Member/Members in the Sub-Committee and finalize report on top priority basis.

11. Shri Goenka, Chairman, informed the Members that as desired by the Minister, work on Plantation aspect has been taken up by M/s. WIMCO, M/S, Kitply Industries and M/s. Mangalam Timber Products Ltd., however this is not sufficient, and a very massive afforestation programme should be taken up by the industry so that not only it serves the Raw-Material problem of the industry but also Industry contributes to increase the green coverage of the Nation. The industry is already in touch with the Ministry of Environment & Forests, and he assured the Minister that in course of time Industry would help in increasing the Forest cover in Joint Sector Plantation concept. The Chairman also stated that Industry is also playing an important role at Export front, and the Export during 1993-94 was of the order of He assured the Minister that the industry will Rs.150 crores. strive to achieve the target of Rs. 200 crores as desired by Hon'ble Minister.

12. The Representative of various Organisations desired that Sub-Committee Chairman should prepare the reports at the earliest possible, and if feasible, before the next Council Meeting proposed to be held in November 1994. The draft reports should be circulated to all Members so that they can study properly and express their views in the Council Meeting. also decided that the Next Meeting of the Council would be held in New Delhi.

THE MEETING ENDED WITH A VOTE OF THANKS TO THE CHAIR.

Annexure 2

Minutes of the second meeting of the Development Council for Plywood and Other Panel Products Industry held at New Delhi on 18th January 1995.

The Second Meeting of the Development Council for Plywood and other Panel Products Industry was held in New Delhi on 18th January 1995 under the Chairmanship of Shri S.P. Goenka. The list of Members and Special Invitees present in the Meeting is annexed herewith.

At the outset Chairman Shri S.P. Goenka extended a very warm welcome on behalf of Development Council and its Members to. Shri V.K. Yadav, Deputy Secretary, Ministry of Industry. The Chairman also welcomed all Members of the Development Council and Special Invitees for sparing their valuable time in coming over to Delhi and attending the Meeting. The Chairman informed that as per decision of the First Meeting of the Development Council, the reports of the Development Panel prepared earlier on Plywood, Particleboard, Hardboard etc. have been duly circulated to the Members by Federation of Indian Plywood and Panel Industry on his behalf and he hoped that everybody would have got the copy of the same.

The Minutes of the First Meeting of the Development Council were circulated on 31st October 1994 by Member-

Secretary and the Chairman requested Members to offer any comments on the same. Members also appreciated that as a follow-up action of the Minutes, Reports have been circulated to all Members which contain very valuable information. Shri Mayee of Planning Commission while thanking for circulating the reports desired that if a small summary of the reports could be made available to the Members it would be helpful to them as Members would not. get time to go through all the reports. The Chairman agreed and informed that summary of recommendations could be made available to all Members. The Minutes of the First Development Council Meeting were confirmed.

The Chairman informed the Members that during the First Meeting of the Development Council, few Sub-Committees were made, and he is glad to inform that almost all of them have given their Report/Views for consideration in this Meeting. Shri M.M. Jalan has given a status paper on Man Made Forests on Wasteland & Degraded Forest Land which has been circulated to all Members. The Chairman requested Shri Mehta, Executive Director, Federation of Indian Plywood and Panel Industry to give a small gist of the status paper. While thanking Shri M.M. Jalan for doing excellent work for preparing the status paper, Shri Mehta, Executive Director, FIPPI pointed out that Shri Jalan has taken trouble of not only giving information on Plantation of our country but also taken trouble of giving comparative information from countries like Japan, Indonesia, Malaysia, New Zealand etc. At this stage a small paper on Plantation aspect and its fiscal measures were made available by Shri S.K. Taneja for Housing Urban Development Corporation (CHUDCO) which was circulated there and then itself. After having detailed discussion, it was decided that views of HUDCO may be incorporated in the status paper and final document could be prepared and presented in the next Development Council Meeting.

In so far as using panel products in low-cost housing and construction is concerned, a detailed discussion was held, and it was agreed that the Development Council should take up the matter with various Organisations and urge upon them to use panel products in low-cost housing and construction by CPWD and other Government Departments etc. At this stage members of Development Council also suggested that under Ministry of Rural Development there is wasteland Development Board who also have lot of Development Schemes for promoting Plantation and this can be obtained and studied properly so that we can make use of this facility for both Plantation on degraded forest. Deputy Secretary (Ministry of Industry) to take a lead on the subject and may coordinate with Wasteland Development Board for obtaining the details of various schemes. It was decided to make a Small Sub-Committee under the Chairmanship of Mr. Yadav with the following members: -

(1) Mr. Harish Khaitan - Andmans Timber Industry.

(2) Mr. M.R. Sharma - M/s. Nuchem.

(3) Mr. Shaish Kumar - Department of I.D.

(4) Mr. P.V. Mehta - FIPPI.

Committee will prepare status report, which will be discussed in the next Development Council Meeting.

Shri Harish Khaitan of M/s. Andamans Timber Industries Ltd., at this stage pointed out that the industry has been facing serious shortage of raw materials because of which the industry has taken up raising plantations on marginal land by providing farmers with technical know-how, planting material and entering into buy-back arrangements at reasonable price for the matured trees. This will go a long way in resolving the problems of raw-material availability for the plywood industry. This action of the industry has been well appreciated by various authorities including Government of India particularly by Ministry of Environment & Forests. He desired that whatever help can be got from Ministry of Rural Development regarding Plant on Wasteland, should be availed so that it will help to a great extent in solving the Wood raw material problems.

In so far as Export projection for next 5 years and comparative benefits to the nation by using Panel Products in low-cost housing and construction is concerned, a detailed note prepared by

by the Chairman himself has been circulated to all Members. It was mentioned that against Export of Rs. 100 Crores during the year 1.994-95, Export could go up to Rs.265 Crores by the year 1998-99 provided some additional items are added to the Import list and Import List of 60% (of the export value) be increased to 75%. After detailed discussion, it was agreed that a note to this effect may be prepared by Member-Secretary in consultation with others. He may take the help of Federation of Indian Plywood & Panel Industry which is stationed in Delhi.

Shri Goenka in his report has stated that Panel Pro-ducts have a very good advantage in low-cost housing and construction. As Panel Products are made of agro-produce Plantation Timber which is grown on quick rotation and thus has low-cost raw material base, Panel Products are 3 times stronger as compared to solid wood given the same thickness. In low-cost housing, even the entire house could be made of Panel Products, using Boiling Waterproof Plywood/Panel

Products for Walling, Roofing and Kitchen and Moisture Resistant grade Panel Products for partition and furniture. Knocked down houses and knocked down furniture are now widely used for shifting houses from place to place. Panel products have become a necessity for the poor and middle-class income group of people for making beds, chairs, table at low cost as they can afford solid timber and the labour charges thereon. It also helps construction activities by providing shuttering, Partition and doors at low cost. Moreover, one may maintain similarity in construction activities with the help of panel products in partitions, doors, connecting etc. The above advantages of panel products in low-cost housing and construction can be hidden only when we go for the following: -

(1) Encourage the farmers to grow trees.

(2) The forest department releases degraded forest land for growing trees by the Industries for Captive Plantation.

(3) The Government releases waste land for growing fuel wood, fodder and industrial wood by industries, farmers, Co-operative.

After detailed discussion in the Development Council, it was decided that Development Council should take up the matter with the various connected Government Organisation for making this proposal success i.e. using panel products in low-cost housing and construction.

Shri Harish Khaitan of M/s. Andamans Timber Industries Ltd. pointed out that fiscal measure is one of the important factors for the growth of this Industry. Government is also conscious about this, and they have reduced Excise Duty from 34.5% to 20% in the Financial Year 1993-94. Now industry needs to invest a large sum of money for modernization of its plant and machinery to successfully use such low diameter plantation timber. For this cash generation, it is essential that our Development Council requests the appropriate authorities for further reduction of Excise Duty on Plywood from 20% to 10% in the budget for the coming Financial Year 1995-96. After detailed discussion, it was agreed that the Chairman may take up the matter with all connected Ministries like Ministry of Industry, Ministry of Environment & Forests and Ministry of Finance and impress upon them for reduction of Excise Duty from 20% to 10% in the budget for the year 1995-96. This will go a long way in not only increasing the Forest cover of the country but also use of more panel products for low-cost housing and construction. At this stage it was also agreed that other panel products like Particleboard and Medium Density Fibreboard which attracts Excise Duty of 10% should also be considered for reduction of duty after ascertaining as to how much quantity of this material are manufactured from Agro base.

The Members desired to know how much work has been done on Plantation aspect by the industry as Plantation is the only answer in the long run for solving the Raw Material problem. The Chairman informed that he himself has done lot of plantations in Assam and M/s. WIMCO Ltd. has done similar Plantation in Uttar Pradesh. Members felt that it would be advisable to see the Plantation Which the Chairman readily agreed and suggested that the next meeting of the Development Council can be held in Assam where not only they can see the Plantation but also visit some of the prominent plywood units. This will give an opportunity to Members to have an idea as to how the Plantation are grown and how the Plywood is manufactured by Plywood units. This was readily agreed, and it was decided to hold the meeting in Assam somewhere in April 1995. The Chairman informed the Members that in so far as fiscal measures are concerned, he will take up the matter with Ministry of Industry and Ministry of Environment & Forests for supporting our request for reduction of Excise Duty from 20% to 10% in the budget for the year 1995-36.

The Meeting ended with a Vote of thanks to the Chair.

Annexure 3

Minutes of the third feeting of the Development Council for Plywood & Other Panel products held in Calcutta on 27th October 1995.

Third meeting of the Development Council for Plywood and Other Panel Products Industry was held in Calcutta on 27th October 1995 under the Chairmanship of Shri S.P. Goenka. The list of Members and Special Invitees present in the meeting is annexed herewith.

At the outset, Shri 3.F. Goenka extended a very warm welcome to all the Members and Special Invitees for sparing their valuable time in coming over to Calcutta for attending the meeting.

The Chairman Shri S.P. Goenka mentioned that during his tenure as Chairman of the Development Council, this is a third meeting being held in Calcutta. The Council's term is also expiring on 19th November 1995, and it is for the consideration of the Council members to suggest whether it requires reconstitution or not. The Council during its meetings had constituted Sub-Committees on different subjects and I am glad to inform you that all the Committees

have not only completed their work but also submitted their respective reports. Few reports were considered in the Second Development Council Meeting, and the last report is to be considered today. All follow-up actions required regarding recommendations of the Sub Committee have been taken. He then requested the Member Secretary to take up the agenda items.

The minutes of the Second Development Council Meeting was circulated on 28th February 1995 by Member Secretary and the Chairman requested Members to offer any comments on the same. There were no comments, as such the minutes were approved in toto.

The Sub-Committee report on manmade forest prepared under the Chairmanship of Shri M.M. Jalan President of FIPPI, was considered in the Second Development Council Meeting held on 18th January 1995. While considering the report, HUDCO gave certain suggestions, and it was decided that these suggestions nay be incorporated in Mr. Jalan's report. After incorporating these suggestions, the report been recirculated to all the Members along with the agenda for consideration in today's meeting. While appreciate-the good work done by Mr. Jalan, certain Members gave their views on the report. Shri Bishnu Prasad, Ex. Member, pointed out the comparison of mode of sessions in India as compared to other countries of the mentioned in the report. He also suggested that the development Council. should take into consideration all the views an approach all the Ministries concerned for specific solving these raw material problems of the industry.

This is all the more necessary as 75-80% of the industry is in the northeastern sector. Shri Arun Brar of M/s. Nuchem Ltd. pointed out that there should be one window clearance for all the help required for encouraging plantation both in the degraded forest lands as well as non-forest waste lands. Shri Harish Khaitan readily agreed to these suggestions and suggested that the Development Council should prepare a status paper so that the industry can approach the specific proposal to both Ministry of Environment & Forest and Department of Wastelands in Ministry of Rural Development. These efforts should be made through Ministry of Industry as they are so aware of the subject. Shri Mayee of Planning Commission pointed out that the report should be reworded in certain paras so that it becomes an acceptable document with the Government. After hearing views of different speakers, Shri Jalan informed that the report has been prepared on the basis of documents re-published by the Ministry of Environment The Chairman thanked all the and Forest from time-to-time Members for the valuable suggestions and thanked Shri Jalan for undertaking so much of trouble in preparing the report. He assured them that all these suggestions would be taken into consideration, and a final report will be prepared and circulated to all the Members.

The Second Meeting of the Development council constituted one more Sub-Committee under the Chairpersonship of Smt. Promila Bhardwaj, Director, Ministry of Industry, or Plantation on Non- Forest Wastelands. This Sub-Committee meld two meetings. Wastelands Development Board made available details of the district wise availability of non-forest wastelands in the two states namely Rajasthan and Uttar Pradesh. The Chairman of the Sub-Committee desired that these details along with deliberation of the meeting could be made available to the industry so that they can prepare specific proposals to utilise the wastelands available for plantation purposes. As desired by the Sub-Committee, the FIPPI not only circulated the minutes of the meeting but also the details of availability of wastelands in the two states i.e. Uttar Pradesh and Rajasthan for the benefit of the industry. The FIPPI also informed the industry that they may take up the matter even directly with the State Government, and if they need any help, they can approach the Ministry of Industry. Shri Sharma of Association of Agro Based Reconstruction Panel Manufacturers suggested that a meeting can be arranged with the Minister in Rural Development Ministry in the form of delegation under the leadership of the Chairman ~~of the Development Council so that we can apprise then a~~t the highest-level regarding problems faced by the industry in ~~meeting the raw material requirement. If need be, a similar~~ delegation can also meet the Minister, 1 Her Environment and Forest. After deliberations on the report, the same was accepted by the Development Council, And the Chairman assured that needful would be done with appropriate authorities. He felt that before meeting either Ministers, the Industry first should prepare a paper concoli dating all the problems faced by the industry and possible solutions so that the meeting could be fruitful.

The present Development Council had a tenure of two years which expires on 19th November 1995. Shri Goenka requested Members to give their suggestions regarding reconstitution of the Development Council. Shri Mehta of FIPPI gave a gist of the work done by the Development Council on various subjects. Earlier there was a Development Panel which was in existence for a period of almost 10 years and the Panel had prepared 5-6 reports which on the request of the Members were circulated for their information. The Development Panel or Development Council has been doing bod work and even summaries of all the reports were made available to all the Members. In view of good work done by the Development Council, Federation strongly felt that the Council should be reconstituted with proper representations

from all concerned organisations. Other members also felt that the Council should be re-constituted to have a proper continuity in the problems being tackled by the Council with active cooperation of the industry. It is felt that the request for reconstitution, care should be taken to see as to what interest has been taken by different members of the existing Council. If certain members have not taken any interest at all, they can be substituted by other who can make useful contribution. Organisations like National Wastelands Development Board, Chemical & Allied Products Export Promotion Council etc. may be included in the next Development Council constitution.

Meeting ended with a vote of thanks to the Chair.

Annexure 4

Progress of work done by Development Council for Plywood and Other Panel Products Industry during its tenure from 19/11/1993 to 18/11/1995

Three Meetings were held of the Development Council and during First meeting few Sub-Committees were formed. Details of the Sub-Committees are as follows: -

1. PLANTATION ON WASTELAND AND DEGRADED FOREST LAND AND ENCOURAGING FARMERS TO USE THEIR DEGRADED LAND FOR TREE PLANTATION. This Committee Was formed under the Chairmanship of Shri M.M. Jalan, President FIPPI and Chairman M/s. Arunachal Plywood Industries Limited.
2. STUDY RATIONALIZATION OF DUTIES BASED ON FREE MARKET ECONOMY. Shri Harish Khaitan, Managing Director of M/s. Andaman Timber Industries Limited has been the Chairman of this Committee.
3. COMPARATIVE BENEFITS TO THE NATION BY USING PANEL PRODUCTS IN LOW-COST HOUSING AND CONSTRUCTION. Shri S.P. Goenka. Chairman, Development Council and Chairman M/s. Kitply Industries Limited has been the Chairman of this Committee.
4. EXPORT PROJECTION FOR NEXT FIVE YEARS AND WAYS AND MEANS TO ACHIEVE THE SAME. This Committee has also been headed by Shri S.P. Goenka, Chairman, Development Council and Chairman M/s. Kitply Industries Limited.

All these Committees have completed their work and have submitted their proposals. During the discussion in the Second Development Council meeting, Housing Urban Development Corporation i.e. HUDCO gave certain suggestions to be incorporated in Mr. Jalan's report which has been done and submitted in the Third Development Council meeting. A sub-Committee was also constituted under the Chairpersonship of Smt. Promila Bhardwaj, Director, Ministry of Industry. This Sub-Committee had two meetings at Delhi and have also given its report which is under consideration of the Third Council meeting.

Federation of Indian Plywood & Panel Industry has assisted the Development Council to the extent possible. Some of the members wanted the report earlier prepared by the Development Panel during its tenure of 10 years and on the request of the Chairman, Development Council, Federation of Indian Plywood & Panel Industry circulated copies of the reports to all members of the Development Council for their information. This was appreciated in the Second Development Council meeting, but the members felt that they would be grateful if the summary of the recommendations could also be prepared and circulated so that members could go through it easily. The Chairman, Development Council promised Members that summary would also be circulated, and Federation of Indian Plywood & Panel Industry circulated the summary of all the reports to the members.

During the two Sub-Committee meetings viz. Under the Chairpersonship of Smt. Promila Bhardwaj Wasteland Development Board made available details of the district wise availability of non-forest wastelands in the two states viz. Rajasthan and Madhya Pradesh and Federation circulated the Minutes of the First meeting and these details to all the members.

Chairman Development Council took up the matter with Hon'ble Minister of State for Industria) Development & Heavy Industries Smt. Krishna Sahi on the decision of the Development Council that Chairman will take up the matter in reduction of Excise duty on Plywood and Panel Products. The letter was addressed by the Chairman Development Council to the Hon'ble Minister requesting her to recommend favourably to Minister of Finance and also to Ministry of Environment & Forests for reduction in Excise Duty.

Federation feels that Council has been giving good work and Development Council should be re-constituted after its term expires on 19th November 1995.

Annexure 5

रजिस्ट्री सं० डीएल-33004/96 REGD. NO. D.L.-33004/96

भारत का राजपत्र
The Gazette of India

असाधारण
EXTRAORDINARY

भाग II—खण्ड 3—उप-खंड (ii)
PART II—Section 3—Sub-section (ii)

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उद्योग मंत्रालय

(औद्योगिक नीति और संवर्धन विभाग)

अधिसूचना

नई दिल्ली, 6 अक्तूबर, 1996

का. आ. 776(अ).—विकास परिषद (प्रक्रिया) नियमावली, 1952 के नियम 2, 4 और 5 के साथ पठित उद्योग (विकास और विनियमन) अधिनियम, 1951 (1951 का 65) की धारा 6 द्वारा प्रदत्त शक्तियों का प्रयोग करते हुए केन्द्र सरकार प्लाईवुड और अन्य पैनल उत्पादों के विनिर्माण से जुड़े अनुसूचित उद्योगों के लिए विकास परिषद के सदस्यों के रूप में नियुक्ति के लिए निम्नलिखित व्यक्तियों को इस आदेश के सरकारी राजपत्र में प्रकाशित होने की तारीख से 2 वर्ष की अवधि के लिए नियुक्त करती है :—

प्लाईवुड तथा अन्य पैनल उत्पाद उद्योग हेतु विकास परिषद

1. श्री एम. एम. जालान, अध्यक्ष
   अध्यक्ष,
   फेडरेशन आफ इंडियन प्लाईवुड तथा पैनल इंडस्ट्री,
   कमरा नं. 1, इंद्रा पैलेस, "एच" ब्लाक,
   कन्नाट सर्कस, नई दिल्ली-1
2. श्री अशोक कुमार, संयुक्त सचिव, सदस्य
   औद्योगिक नीति और संवर्धन विभाग,
   नई दिल्ली
3. श्री ओम प्रकाश, उप सचिव, सदस्य
   औद्योगिक नीति और संवर्धन विभाग,
   नई दिल्ली
4. श्री शेष कुमार, विकास अधिकारी, सदस्य-सचिव
   औद्योगिक नीति और संवर्धन विभाग,
   नई दिल्ली
5. अध्यक्ष, सदस्य
   पार्टिकल बोर्ड मेन्युफेक्चरर्स एसोसिएशन,
   9, वेल्लेस स्ट्रीट, मुम्बई-400601
6. अध्यक्ष, सदस्य
   अखिल भारतीय कृषि बोर्ड संघ,
   65/1-ए, "आकर्षक" नालस्टोप के सामने,
   कार्वे रोड, पुणे-4
7. अध्यक्ष, सदस्य
   कृषि आधारित पुर्नगठित पैनल विनिर्माता संघ,
   ई-46/12 ओखला औद्योगिक क्षेत्र, फेस-2,
   नई दिल्ली-20
8. अध्यक्ष, सदस्य
   साउथ इंडियन प्लाईवुड विनिर्माता संघ,
   पो. बाक्स नं. 243, मनोहर हिल बिल्डिंग
   कोट्टायम, केरल
9. श्री शान्ति प्रकाश गार्यका, सदस्य
   अध्यक्ष,
   किटप्लाई उद्योग लिमिटेड, कलकत्ता

2762 GI/96 (1)

10.	श्री हरीश ई मैसर्स अण्ड ... लिं., सरकुलर कोर्ट, 7वां तल, 8, आचार्य जे. सी. बोस रोड, कलकत्ता-17	सदस्य
11.	मैसर्स पालघर प्लाईवुड प्रोडक्टस लि., 3, विराज कुंज, विले पार्ले (पश्चिम), मुम्बई-56	सदस्य
12.	वन महानिरीक्षक, पर्यावरण और वन मंत्रालय, पर्यावरण भवन, सीजीओ काम्पलेक्स, लोदी रोड, नई दिल्ली-3	सदस्य
13.	विकास आयुक्त लघु उद्योग, निर्माण भवन, नई दिल्ली	सदस्य
14.	महानिदेशक, भारतीय वन अनुसंधान तथा शिक्षा परिषद, पो. आ. न्यू फोरेस्ट, देहरादून-248006	सदस्य
15.	निदेशक, भारतीय प्लाईवुड अनुसंधान उद्योग तथा प्रशिक्षण संस्थान, पोस्ट बेग सं. 2273,डुमकुर रोड, बंगलौर-22	सदस्य
16.	महानिदेशक, भारतीय मानक कार्यालय, मानक भवन, 9, बहादुरशाह जफर मार्ग, नई दिल्ली-2	सदस्य
17.	सलाहकार (उद्योग), योजना आयोग, योजना भवन, नई दिल्ली	सदस्य
18.	कार्यकारी निदेशक, कैमिकल्स तथा सम्बद्ध उत्पाद निर्यात संवर्धन परिषद विश्व व्यापार केन्द्र,14/1 बी, इजरा स्ट्रीट, कलकत्ता	सदस्य
19.	निदेशक, प्रौद्योगिकी विस्तार पेट्रोलियम विकास विभाग बोर्ड, एनबीओ बिल्डिंग, निर्माण भवन, नई दिल्ली	सदस्य
20.	मुख्य श्रम आयुक्त, श्रम मंत्रालय, श्रम शक्ति भवन, रफी मार्ग, नई दिल्ली	सदस्य
21.	निदेशक, योजना तथा वास्तुकला स्कूल, मानव संसाधन विकास मंत्रालय, 4 ब्लाक, आई पी एस्टेट, नई दिल्ली-2	सदस्य
22.	व्यापार संघ के प्रतिनिधि, (बाद में सम्मिलित किया जाएगा)	सदस्य
23.	आवास तथा शहरी विकास निगम लि. नई दिल्ली के प्रतिनिधि	सदस्य
24.	श्री पी. के. मोहम्मद, प्रबंध निदेशक, वेस्टर्न इंडिया प्लाईवुड लि., वलापट्टनम, जिला कन्नूर, केरल	सदस्य
25.	प्रबंध निदेशक, ट्रावनकोर प्लाईवुड उद्योग लि., पुनालुर, जिला कोल्लम, केरल ।	सदस्य

[फा. सं. 4/1/96-सी. आई.]

अशोक कुमार, संयुक्त सचिव

MINISTRY OF INDUSTRY

(Department of Industrial Policy and Promotion)

NOTIFICATION

New Delhi, the 6th October, 1996.

S.O. 776 (E).—In exercize of the powers conferred by Section 6 of the Industries (Development and Regulation) Act; 1951 (65 of 1951), read with Rules 2, 4 and 5 of the Development Council (Procedural) Rules, 1952 the Central Government hereby appoints for a period of two years with effect from the date of publication in the Official Gazette of this order, the following persons to be Members of the Development Council for the Scheduled Industries engaged in the manufacture of Plywood and other Panel Products :—

DEVELOPMENT COUNCIL FOR PLYWOOD AND OTHER PANEL PRODUCTS INDUSTRY

1.	Shri M. M. Jalan, President, Federation of Indian Playwood and Panel Industry, Room No. 1, Indra Palace, 'H' Block, Connaught Circus, NEW DELHI-110001.	Chairman
2.	Shri Ashok Kumar, Joint Secretary, Deptt. of Industrial Policy and Promotion, NEW DELHI.	Member
3.	Shri Om Prakash, Deputy Secretary, Deptt. of Industrial Policy and Promotion Udyog Bhavan, NEW DELHI.	Member
4.	Shri Shaish Kumar Development Officer, Deptt. of Industrial Policy and Promotion, Udyog, Bhavan, NEW DELHI.	Member-Secretary

5. The President, Member
Particle Board Manufacturers' Association,
9, Wallace Street,
BOMBAY-400 601.

6. The President, Member
All India Agro Boards Association,
65/1-A "AKARSHAK",
Opp. Nalstop, Karve Road,
PUNE-411 004.

7. The President, Member
Association of Agro-based re-constituted Panel Manufacturers,
E-46/12 Okhla Industrial Area,
Phase II, New Delhi-110 020.

8. The President, Member
The South Indian Plywood Manufacturers' Association,
P.O. Box No. 243,
Manohar Hill Building, Kottayam,
KERALA.

9. Shri Shanti Prakash Goenka, Member
Chairman,
Kitply Industries Ltd.,
CALCUTTA.

10. Shri Harish Khaitan, Member
Managing Director,
M/s. Andaman Timber Industries Ltd.
Circular Court, 7th Floor,
8 Acharya J.C. Bose Road,
CALCUTTA-700 017.

11. M/s. Palghar Plywood Products Ltd., Member
3 Viraj Kunj,
Vile Parle (West),
BOMBAY-400 056.

12. Inspector General of Forests, Member
Ministry of Environment & Forests,
Paryavaran Bhavan, CGO Complex,
Lodhi Road, NEW DELHI-110 003.

13. Development Commissioner, Member
Small Scale Industries,
Nirman Bhavan,
NEW DELHI.

14. The Director General, Member
Indian Council of Forestry Research and Education,
P.O. New Forest,
DEHRADUN-248 006.

15. The Director, Member
Indian Plywood Industries Research & Training Institute,
Post Bag No. 2273, Tumkur Road,
BANGALORE-560 022.

16. The Director General, Member
Bureau of Indian Standards,
Manak Bhavan,
9 Bahadur Shah Zafar Marg,
NEW DELHI-110 002.

17. The Adviser (Industries), Member
Planning Commission,
Yojana Bhavan,
NEW DELHI.

18. The Executive Director, Member
Chemicals & Allied Products Export Promotion Council (CAPEXIL),
World Trade Centre,
14/1 B, Ezra Street,
CALCUTTA.

19. The Director, Member
Technology Extension,
Deptt. of Wasteland Development,
Board, NBO Building,
Nirman Bhavan, NEW DELHI.

20. The Chief Labour Commissioner, Member
Ministry of Labour,
Sharam Shakti Bhavan,
Rafi Marg,
NEW DELHI.

21. The Director, Member
School of Planning & Architecture,
Ministry of Human Resource Development,
4 Block , I. P. Estate,
NEW DELHI-110 002.

22. Representative from the Trade Union (to be nominated later on) Member

23. Representative of the Housing & Urban Development Corporation Ltd., Member
NEW DELHI.

24. Shri F.K. Mohammed, Member
Managing Director,
Western India Plywood Ltd.
Valapattanam, Distt. Kanoor,
KERALA.

25. The Managing Director, Member
Travancore Plywood Industries Ltd.,
Punalur, Distt. Kollam,
KERALA.

[F. No. 4/1/96-CI]
ASHOK KUMAR, Jt. Secy.

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Annexure 6

Minutes of the first meeting of the Development Council for Plywood and Other Panel Products Industry held on 12th February 1997 in New Delhi.

The first meeting of the Development Council and other Panel Products Industry was held in New Delhi on 12.2.1997 under the Chairmanship of Shri M.M. Jalan. A list of Members and special Invitees present in the meeting is annexed herewith. At the outset Shri M.M. Jalan welcomed all the members and special invitees present in the meeting for sparing their valuable time for attending the meeting.

In the opening remarks Chairman has stated that the per capita consumption of plywood and other panel products in the country is lowest, however, the demand is much more than the supply. This particular period is bad for the industry due to recent Supreme Court order. It is further stated that main reasons for decrease, in forest cover is due to ever increasing demand of fuelwood and fodder.

There is also 170 million hectares of waste land available in the country, out of which 34 million hectares is degraded waste land. On an approximate figure, on a conservative side, 1.2 billion US dollar investment is required for plantation purpose and as such multi-national's and private parties may be invited for such a huge investment. In this context, it is worthwhile to mention that 90% of the cost in the plantation business accounts for wages which gives ample opportunity for rural employment. Chairman have stated that the last Development Council had given the report on plantation which has been accepted and recommended but there was no implementation of it. Member's emphasised that plantation is the need of the hour since land and manpower required for this purpose are adequate in the country. With proper management, plantation in the forest sector can be implemented which can provide employment to the 30 million unskilled people.

The regular agenda items were taken up. Regarding the first point in the agenda, Member Secretary invited suggestions among the members. Mr. Jalan stated that as far as waste land is concerned, they are taking up the matter with the Ministry of Environment for the methodology to be adopted so that the waste land should be handed over to the industry for plantation purpose. This sector can give gainful employment from small capital and also ecological balance can be maintained and the raw material requirement of the industry can be met. Shri Om Prakash, Deputy Secretary, pointed out that beside the growth of the industry, industry should also think of social obligation in their part. Mr. Jalan certified that while doing the plantation, 25% of the extraction i.e. tops and lops will be provided as fuelwood and also, gainful rural employment will be generated. Mr. Jalan has given the example of China where at one stage they were starving for the raw material and now they have created one of the largest man-made forests and if we can follow the same course, we can meet the raw material requirement of the industry to a large extent. One of the members stated that the Land Ceiling Act do not allow to do the plantation. The main difficulty is in identifying the waste land since on paper it is shown that there is 1400 million hectares but for which there is no map available and as such further action plan could not be implemented. Most of the members agreed with this view that unless the lands are made available, they cannot take any effective steps. It is also suggested that the matter can be raised in Supreme Court. Mr. P.D. Mayee suggested that it will not be proper that such issues can be discussed first at the proper forum with the Government. He further stated that in the first instance the industry should come out with the proper planning for the development of waste land.

Mr. Periwal of National Plywood Industry pointed out the various problems faced by the industry in acquiring the waste land. Chairman agreed with this view and also suggested that industry can start with crop sharing basis initially on less degraded land and Supreme Court can be given suggestions on this basis. Mr. Khaitan agreed with this view and said that the above suggestions will give some positive results. This issue was discussed in length and finally it was felt that in the absence of presence of representative of Ministry of Environment and Forest, this issue cannot be discussed further.

Dr. K.A. Kushalapa, Director, IPIRTI, emphasised the need of Joint Forestry Management and encouragement to captive plantation industry since the budgetary grant from the Government is not enough.

Mr. Khaitan suggested that the Council should take up the problem of industry with Ministry of Environment and Forest and also Ministry of Industry, to this Mr. P.D. Mayee pointed out that industry should first prepare an approach paper with specific suggestions from Council side. Mr. S.K. Taneja of HUDCO stated that "employment with forestry" which has been discussed earlier can be highlighted in the approach paper. Mr. Jalan agreed with this view and a small committee was formed for this work which consists of Mr. Khaitan, Mr. P.D. Mayee and Dr. K. Kushalapa. This Committee will prepare a suitable paper urgently for taking up the matter with the Ministry of Environment and Forest.

Mr. V.S. Raju of All-India Agro Based Association emphasised on the alternative source of raw material He has stated that plantation: is a long-term solution, however, current situation which arises out of Supreme Court decision, can only be solved if industry will switch over to Agro Based raw materials. Industry and Research Organisation should make their best efforts to use these raw materials such as baggase. Mr. Jalan endorsed his view with a remark that there are some products like plywood where agro wastes cannot be used.

Mr. Jalan stated that as per reports available, out of a total wood consumption, 70% is used as a fuelwood, as such all the blames for depletion of the forest cover cannot be put on the shoulders of the industry.

Mr. P.D.Chitlangia of Sarda Plywood is of the view that the current land laws are hinderance for plantation and this is an area where we should put our efforts and see to it that how best we can create a great national wealth.

Mr. Periwal stated that demand of panel products is increasing which is met through imports since production is stagnant. The above situation is bound to effect on exports, as such the resources should be well managed.

Mr. Jalan and Mr. Om Prakash were of the view to form a Sub-Committee to highlight the merits and demerits of plantation on degraded waste land under the chairmanship of Shri Harish Khaitan with other members such as Dr. Kushalapa, Mr. P.D. Mayee and Mr. S.K. Taneja. The above Committee can have the guidance of Chairman of the Development Council. The Chairman agreed with the above view.

Chairman desired that the second and third point of the agenda may be deferred in view of the current crises and can be taken up only in the next meeting.

Regarding fourth point of the agenda i.e. Eco-mark products to be exempted from the ban by CPWD. Mr. P.V. Mehta of FIPPI informed that they have already taken up the matter with BIS and Ministry of Environment and Forest.

Regarding fifth point of the agenda, i.e. rationalisation of duty structure, it was informed by Mr. Mehta that Federation has already recommended to Ministry of Finance for lowering of duty from 20% to 1.0% under Chapter 44. Chairman suggested that we may await the outcome of the Union Budget which will be announced shortly.

Mr. A. Pal of CAPEXIL stated that as per current statistics available, export of plywood and other wood-based panel has increased as compared to last year. He said that with best efforts put by Member Secretary of the Development Council, CAPEXIL is now one of the Member of this Council and it will be their pleasure to participate in the Council Meetings in near future.

Mr. Jalan thanked all the Members and Special Invitees for sparing their valuable time in attending the meeting.

The meeting ended with a vote of thanks to the Chair.

Annexure 7

Justification for Reconstitution of Development Council for Plywood and other Panel Products Industry Under The Industries (Development & Regulation) Act, 1951.

1. Introduction

The Indian wood-based industry comprising plywood, blockboard, flush doors, MDF, particleboard, hardboard, and other engineered wood products, is an integral part of our country's manufacturing sector and a strong driver of sustainable development. It contributes significantly to housing, furniture, infrastructure, and rural employment.

India's plywood and panel industry was valued at approximately INR 27,000 crore in 2022-23, recording a robust Compound Annual Growth Rate (CAGR) of 14.2% between 2018 and 2023 (Source: Annual Survey of Industries, ASI). According to Ply Reporter, the plywood segment alone accounted for around INR 40,000 crore in the year 2018, while MDF and particle board (PB) sectors valued at approximately INR 10,000 crore each. Wood panel being a main component for furniture manufacturing in India has shown tremendous growth over past years and there is huge headroom for evolution in terms of modernization and upgradation. This growth is being driven by urban housing demand, rising disposable income, product premiumisation, preference to branded products, Government initiatives such as 'Housing for All', Smart cities and the removal of the ban on use of timber in construction by CPWD on the advice of MOEF&CC.

Nearly 92% of the wood used by the industry is sourced from Trees Outside Forests (ToF)/agroforestry farmland, benefiting over 10 lakh farmers engaged in timber tree cultivation. This ecosystem supports India's Sustainable Development Goals (SDGs) by enhancing rural livelihoods, increasing farmer incomes, saving foreign exchange,

expanding vegetation cover, and contributing to GDP growth. It also plays a vital role in achieving India's Nationally Determined Contributions (NDCs) for climate change mitigation, adaptation, and carbon sequestration.

Agroforestry has immense potential to generate national value through employment creation, import substitution, export promotion, and support for Atmanirbhar Bharat. However, the lack of a formal policy or regulatory framework for nursery development and financial support limits its scale. A well-structured policy framework and institutional support through the Development Council can boost further opportunities, generating over 2 million additional jobs across the value chain while ensuring sustainable and inclusive growth.

India's progress in timber availability over the past few decades is now expected to more than double in the next ten years. This vast increase will warrant additional land outside forests to generate the incremental resource requirement. As per an industry calculation, even if 5 per cent additional agricultural land were allocated for timber growth, this would alone generate 222 million cubic metres of wood annually for 10 years and 110 million cubic metres of plywood, MDF, particle board, other wood-based products each year across the decade.

The Development Council functioned effectively and contributed to the growth of the plywood and panel industry during its tenure in the past from 1993-95 and later from 1996-98. However, its dissolution after 1998 led to the absence of an institutional platform to represent the industry's concerns, resulting in fragmented communication, delayed policy interventions, and a lack of coordinated support from relevant ministries, impeding the industry's ability to respond effectively to evolving challenges and opportunities.

Moreover, the Indian Plywood Industries Research and Training Institute (IPIRTI) previously functioned as an autonomous body under the Ministry of Environment, Forest and Climate Change (MoEF&CC), with the Forest Minister serving as the Chairperson of its Governing Body. It served as the sole platform through which industry-related concerns could be raised, to some extent, at the ministerial level. However, this level of engagement and institutional access has significantly diminished following the MoEF&CC's decision to merge IPIRTI with the Institute of Wood Science and Technology (IWST) in October 2022.

The Federation of Indian Plywood and Panel Industry (FIPPI) has been flagging issues from a long time, but expected results have not been achieved due to the lack of institutional mechanism. This strongly highlights the need for the reconstitution of the Development Council for this sector to function as a nodal agency to ensure convergence of all sectorial and inter-ministerial assistance.

2. Previous Achievements and Work Done by the Development Council in the Past

The Development Council, active from 1993 to 1995 and reconstituted for a second term from 1996 to 1998, played a pivotal role in addressing industry concerns and supporting the growth of the wood-based sector through effective policy engagement, coordination, and collaboration. During its tenure, the Council functioned well and made significant progress in identifying the core challenges of the plywood and panel industry. Progress made on major identified issues during this period included:

- Advocating for the use of degraded forest land and wasteland for captive plantations to overcome raw material scarcity and preparing a roadmap.
- Recommending fiscal measures such as rationalization of customs and excise duties to support industry growth.
- Encouraging farmer participation in plantation and promoting employment opportunities in rural areas.
- Preparing export strategies and growth projections to boost international competitiveness.
- Facilitating collaboration with government bodies and industry stakeholders to implement sustainable solutions.

Engagements with the Housing and Urban Development Corporation Limited (HUDCO), the Wasteland Development Board, and the Ministry of Environment and Forests (MoEF) were instrumental in promoting panel products in low-cost housing and encouraging plantation- based sourcing of raw material.

However, the industry faced an unprecedented crisis following the Hon'ble Supreme Court's order dated 12 December 1996, in the TN Godavarman vs Union of India case, which imposed severe restrictions on tree felling in all areas classified as 'forest' and discontinued the operations of wood-based industries in India. This judgment severely impacted wood-based industries and led to the closure of most of the wood-based industries in the Northeast region. As a result, production plummeted drastically from 62.52 metric tonnes in 1991 to just 14.61 metric tonnes in 1997, marking a sharp decline in industry output.

Following the setback caused by the Supreme Court's judgment, the plywood and panel industry pivoted towards sustainable sourcing by embracing agroforestry and plantation timber. Organised players relocated their manufacturing units to states with port access or established agroforestry supply chains, while unorganised clusters emerged in states such as Haryana, Punjab, Uttar Pradesh, Kerala, Karnataka, and Gujarat. This transition led to the widespread adoption of fast-growing timber species such as Poplar & Eucalyptus in Northern India and Rubber wood & Silver oak in Southern India.

Indian Plywood & Panel Industry, as on date, consists of around 3,300 units (small, medium and large units) scattered all over the country providing employment to over 3.5 million people. Out of these 3,300 units, nearly 3,200 units are in the un-organized sector. Plywood production in India has witnessed steady growth, reaching approximately 12 million cubic meters (cbm) in 2024. Additionally, the production of particle board stands at around 4.5 million cbm, while the MDF industry has also grown rapidly reaching a production of nearly 3.9 million cbm in 2024. This remarkable growth has been driven largely by the industry's shift to agroforestry- based raw material sourcing, technological advancements, economic growth, rising incomes, and affordable housing initiatives.

3. Present Context – QCO Implementation and Industry's Innovation and Growth

The Government of India is building a robust quality ecosystem to align with the Make in India vision of Zero Defect, Zero Effect. As part of this effort, the Department for Promotion of Industry and Internal Trade (DPIIT) and the Bureau of Indian Standards (BIS) have issued Quality Control Orders (QCOs) for plywood and panel products (effective February 2025) and Quality Control Orders (QCOs) for furniture (effective February 2026). These mandatory standards aim to strengthen domestic manufacturing, enhance consumer safety, and establish India as a global hub for high-quality, standardized products and while discouraging the production and circulation of substandard, non-compliant products.

As a result, the industry is expected to witness a significant growth in both domestic demand and export potential post-QCO enforcement. This initiative will play a key role in developing superior quality products in India, thereby fulfilling the Prime Minister's vision of creating an 'Atmanirbhar Bharat'.

The interior wood products industry in China has grown by 2.6 times over the past decade, driven by a conducive and forward-looking policy framework. Once a net importer, China has now emerged as the largest global exporter of these products. Today, China boasts 75% of World's plywood production, 43% of World's MDF production and 27% of World's particle board production. Similarly, Vietnam has demonstrated how proactive policies such as forest rehabilitation operations, national program on regreening barren land and planting five million new forests have favoured the growth of wood-based industry while expanding forest and tree cover from 28% to 42% in the past three decades.

India, too, must adopt a robust policy framework to unlock its vast potential in agroforestry and sustainable timber production. By selectively adopting progressive elements of China's policy model, India is well-positioned to become the second-largest manufacturing hub of agroforestry-based wood products globally in near future.

With QCO enforcement acting as a quality benchmark, the Indian plywood and furniture sectors are entering a new growth phase. The Development Council can serve as the nodal agency to drive this transformation by facilitating capacity building, certification compliance, and market development for domestic and international markets.

However, effective implementation and compliance require robust institutional mechanisms and inter-ministerial coordination, especially given that timber falls under the Ministry of Environment, Forest and Climate Change (MOEF&CC), agroforestry under the Ministry of Agriculture and timber products falls under the Department for Promotion of Industry and Internal Trade (DPIIT).

4. Benefits and Need of the Development Council for the Plywood and other Panel Products Industry

A reconstituted Development Council for Plywood and other Panel Products Industry will provide a statutory platform for continuous dialogue, policy formulation, collaboration and coordinated action among all stakeholders, including government ministries, industry representatives, and end consumers. The Council can provide the following benefits to the plywood, panel and furniture sector:

- Facilitate inter-ministerial coordination between MOEF&CC, Ministry of Agriculture, and DPIIT, integrating timber and agroforestry policies under a common platform.
- Address critical challenges such as raw material scarcity, climate change, carbon sequestration, and the need

for innovation and R&D in new products. The persistent issue of raw material scarcity requires a dedicated policy decision-making body. A reconstituted Development Council can serve this purpose by recommending sustainable sourcing strategies and incentivizing plantation-based supply chains.

- Support the implementation and monitoring of QCOs, ensuring industry-wide compliance and quality assurance.
- Facilitating innovation and product development and building workforce capabilities in allied segments. It will also create forward linkage with the furniture sector and backward linkage with the farmers engaged in agroforestry.
- Provide a unified forum for deliberation, consultation, and resolution of sectoral issues.
- Generate employment opportunities and support rural prosperity by integrating agroforestry into national and state development policies, thereby supporting millions of farmers through income generation.
- The constitution of the Council will help reduce India's dependence on the imports of wood and wood products, which are approximately valued at 22,000 INR crores, out of which the imports of plywood, MDF and particleboard are approximately 3500 INR crores (Source: Department of Commerce, Ministry of Commerce and Industry, Government of India). This will significantly strengthen domestic supply chains and promote self-reliance in the wood-based sector.
- The Development Council will also include representation from the furniture manufacturing sector to resolve regulatory and supply chain issues, thereby making the sector more competitive and globally integrated.

Importantly, after QCO implementation, there is a clear growth opportunity for the Indian panel and plywood industry to lead globally with high-quality, sustainable, and certified products. The industry is transitioning into a phase of significant growth, but achieving this potential requires a strong institutional framework for guidance and support.

5. Conclusion

It is evident that the absence of a dedicated institutional mechanism has significantly impeded the accelerated growth of the wood-based industry in India. The wood-based industry must overcome some major challenges; ranging from availability of raw material supply to the need for supportive timber policy framework, many of which are putting the sector's long-term viability at risk. Therefore, a need for reconstituting the Development Council for Plywood and other Panel Products Industry is both timely and essential. Such a platform would help steer the industry through the upcoming QCO enforcement, enable collaborative policymaking, and support India's ambition to become a global leader in sustainable wood-based manufacturing.❑

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NOTIFI-CATION FOR CAMPUS INTERVIEW ON 12th NOVEMBER, 2025

ICFRE-IWST is a premier National Research & Training Institute in the field of plywood and panel products with excellent laboratory and pilot plant facilities. The Institute has been meeting the human resource needs of the growing plywood and panel product In-dustries for various positions such as Production Managers, Quality Control Managers, Marketing Managers, Team Leaders and Chemists. ICFRE- IWST flagship **one-year PG diploma course in WOOD AND PANEL PRODUCTS TECHNOLOGY.**

Campus interview for the successful trainees of 35th Batch is scheduled on Wednesday 12th November, 2025 at ICFRE-IWST (IPIRTI Peenya, Campus). Interested industry or organizations may send a line of confirmation for their willingness to participate in the Campus Interview by email at dir_iwst@icfre.org, director.iwst@gmail.com Any corri-gendum to above notification, student's biodata and other information will be available at https://iwst.icfre.gov.in/ for further information or clarification please contact Ms. Sujatha D, Head PPPT Division (Phone: 080-30534005; Email: sujathad@icfre.org) and Dr. Vinod Kumar Upadhyay, Course Director (Tel. No. 080-30534015, 9663270680, E-mail: upadhyayvk@icfre.org, pgdc_iwst@icfre.org).

Director
ICFRE-IWST, Bangalore

Shri Sajjan Bhajanka Felicitation Moments

An Evening of Honour: Plywood and Panel Industry Felicitates Padma Shri Sajjan Bhajanka

On 10th July 2025, the Federation of Indian Plywood and Panel Industry (FIPPI) hosted a grand felicitation ceremony at The Taj Mahal Hotel, New Delhi, in honour of Shri Sajjan Bhajanka, Chairman of Century Plyboards, who was recently conferred the prestigious Padma Shri by the Hon'ble President of India. The recognition stands as a testament to his outstanding contributions to trade and industry and his decades of transformative impact on the plywood and panel sector.

The evening was a heartfelt tribute to Shri Bhajanka's visionary journey, marked by integrity, innovation and an unwavering commitment to sustainability. His leadership has been instrumental in shaping a globally competitive Indian plywood and panel sector. The felicitation ceremony was graced by respected members of the plywood and panel industry, underscoring the collective admiration for his legacy.

The proceedings culminated in an executive dinner that fostered meaningful dialogue on the industry's future. The event not only celebrated a remarkable achievement but also strengthened collaboration and reaffirmed the sector's shared commitment to building a vibrant and prosperous road ahead.

Speaker - Mr. N.K. Aggarwal (Action Tesa, Balaji Action Buildwell).

Mr. N. K. Aggarwal, Patron of the Federation of Indian Plywood & Panel Industry (FIPPI), conveyed his sincere appreciation for Mr. Sajjan Bhajanka with a heartfelt poem written in his honour. He also underscored Mr. Bhajanka's instrumental role in securing a major victory for the plywood and panel industry: the successful reduction of the GST rate from 28% to 18%. Mr. Aggarwal praised his relentless efforts and effective leadership, recognizing that this accomplishment provided significant relief and fostered new growth prospects for the entire sector.

दीप जलते रहें, जगमगाते रहें। सज्जन जी हर पल मुस्कुराते रहें। जब तक है जिंदगी दुआ है हम सबकी आप चांद तारों की तरह जगमगाते रहें।।

गुल ने गुलशन से गुलफाम भेजा है। सितारों ने आसमान से सलाम भेजा है। मुबारक हो आपको पद्म श्री हम सब ने दिल से यह पैगाम भेजा है।।

Speaker - Mr. Rajesh Mittal (Greenply Industries Ltd

Mr. Rajesh Mittal, President of the Federation of Indian Plywood & Panel Industry (FIPPI), extended his sincere thanks to everyone present. He highlighted the immense pride the industry feels for Mr. Sajjan Bhajanka, who was recently awarded the Padma Shri. Mr. Mittal spoke warmly of his long-standing relationship with Mr.Bhajanka, recalling him as a guiding figure and mentor, much like an elder brother, since their early days in Assam. He emphasized that Mr. Bhajanka's prestigious award is a significant honour not just for him personally, but for the entire industry.

Speaker - Mr. Jaydeep Chitlangia (Duroply Industries Ltd.)

Mr. Jaydeep Chitlangia, Senior Vice President of the Federation of Indian Plywood & Panel Industry (FIPPI), praised Mr. Sajjan Bhajanka as a visionary with a nation-building spirit, highlighting his significant contributions beyond business. He described Mr. Bhajanka as a person deeply dedicated to education, Hindutva, and social progress. Mr. Chitlangia remarked that Mr. Bhajanka's combination of a brilliant mind and a generous heart serves as an inspiration to the entire industry. He concluded by conveying his deep gratitude and admiration for Mr.Bhajanka's profound impact on society and the nation.

Speaker - Mr. Pragath Dvivedi (Plyreporter) with Padma Shri Sajjan Bhajanka

Mr. Pragath Dvivedi engaged Mr. Sajjan Bhajanka in a discussion on China's industrial growth model and India's prospects. He asked Mr. Bhajanka to share insights about the struggles faced by large industries and the path forward for India.

Message from Shri Sajjan Bhajanka

Mr. Bhajanka reflected on the transformation of the plywood industry, recalling that it was once considered critical, especially in Assam, but has grown significantly due to innovation, modern techniques, and perseverance. He noted that in the next ten years, the plywood industry is expected to grow by 10%, with similar growth anticipated in MDF and particle board sectors. He also highlighted that agroforestry and trees outside forest covers 9% of India and reserve forests cover 16% of India, emphasizing that with such strong foundations, future production, factories, and plantations will expand, and the industry must continue to grow.

Mr. Sajjan Bhajanka began by expressing his heartfelt gratitude to everyone for their love, support, and blessings. He shared the memorable moment when he first came to know about the Padma Shri award and reflected on his journey from humble beginnings.

Recalling his early days, Mr. Bhajanka narrated how he started his independent career in 1976, when he had very little, and steadily built his path through perseverance and dedication. He concluded by thanking everyone and offering his prayers for the growth, success, and well-being of everyone present, leaving a message of humility, inspiration, and encouragement for the industry.

Speaker - Padma Shree Sajjan Bhajanka (Century Plyboards)

Speaker - Mr. Prem Bhajanka, Managing Director, Century Plyboards (India) Ltd

Mr. Prem Bhajanka shared warm memories of his long association with Mr. Sajjan Bhajanka, which dates back to 1980. He recounted a foundational business principle Mr.Sajjan Bhajanka taught him: the importance of diligently addressing every customer's concern. He also shared a core life lesson from him—that success is built purely on hard work and honesty. Mr. Prem Bhajanka concluded by expressing his profound respect and gratitude for these enduring values, which have inspired him and many others in the industry.

Mr. Jikesh Thakkar Vice President of the Federation of Indian Plywood & Panel Industry (FIPPI), shared that his association with Mr. Sajjan Bhajanka dates back to 2006, coinciding with the founding of ILMA. He highlighted Mr. Bhajanka's pivotal role in the organization's growth

Speaker - Mr. Jikesh Thakkar (Rushil Decor Ltd.)

Dr. M.P Singh (FIPPI)

and development, crediting his vision, leadership, and unwavering support as guiding forces. Mr. Thakkar concluded by expressing his sincere gratitude for Mr. Bhajanka's invaluable contributions and his inspiring presence throughout ILMA's journey.

Speaker - Dr. C.N. Pandey (FIPPI)

Dr. C. N. Pandey Senior Technical Advisor of the Federation of Indian Plywood & Panel Industry (FIPPI), shared that his association with Mr. Sajjan Bhajanka began in 2003, marking the start of a long and meaningful professional relationship. He highlighted that Mr. Bhajanka has always been a source of innovative ideas and guidance, consistently providing new directions for research and development in the plywood and panel industry. Dr.Pandey appreciated his forward-thinking approach and valuable contributions that have helped drive progress and innovation in the sector.

Dr. M. P. Singh Director General of the Federation of Indian Plywood & Panel Industry (FIPPI) began his address by warmly congratulating Mr. Sajjan Bhajanka on being honoured with the Padma Shri award. He also extended his gratitude to Mr. Bhajanka for his significant contributions to the Development Council, acknowledging his guidance and involvement as crucial to the sector's progress. Dr.Singh emphasized the importance of Mr. Bhajanka's continued support for the industry's upcoming initiatives and noted with appreciation that, for the first time, representatives from all associations were present at the event.

He concluded the felicitation ceremony with a vote of thanks, expressing heartfelt appreciation to all dignitaries, speakers, and attendees for their presence and contributions. He thanked Mr. Sajjan Bhajanka for inspiring the industry with his vision, dedication, and leadership. Dr.Singh also acknowledged the efforts of, the organizing team, participants from various associations, and all members of FIPPI for making the event a memorable and successful occasion.

Mr. Akhilesh Chitalngia (Duroply Industries Ltd.), Dr. M.P. Singh (FIPPI), Padma Shri Sajjan Bhajanka, Mr. Jaydeep Chitlangia (Duroply Industries Ltd.) & Mr. Sudeep Chitlangia (Duroply Industries Ltd).

Mr. Jikesh Thakkar, Mr. Krupesh Thakkar (Rushil Décor Ltd.), Mr. Rajesh Mittal (Greenply Industries Ltd.), Padma Shri Sajjan Bhajanka & Dr. M.P. Singh (FIPPI) (From: Left to Right).

Mr. Dhanesh Pandey & Mr. Avnish Kumar (Century Plyboards India Ltd.) with Padma Shri Sajjan Bhajanka.

Dr. Prashanth M. (South India Plywood Manufacturers Association (SIPMA))), Mr. M. Mujeeb Rehman (All Kerala Plywood & Block Board Manufacturer's Association), Padma Shri Sajjan Bhajanka & T.P. Narayanan (North Malabar Plywood & Door Manufacturers) (From Left to Right).

Mr. Ajay Garg (E3 Group) & Mr. Ram Babu Aggarwal (Crossbond) with Padma Shri Sajjan Bhajanka (From: Left to Right).

Mr. Bhavesh Patel, Mr. Navin Patel, Mr. Nikunj Patel, Mr. Vasant Patel, & Mr. Vinod Patel (Gujarat Plywood & Veneer Manufacturers Association) with Padma Shri Sajjan Bhajanka.

Mr. Sandeep Aggarwal & Mr. Aditya Aggarwal (Northern Plywood Products) with Padma Shri Sajjan Bhajanka.

Mr. Bobby Verma (Amazon Wood Pvt. Ltd.), Dr. Sunil Goyal (Delhi NCR Plywood Manufacturers' Association), Padma Shri Sajjan Bhajanka & Mr. Amit Goel (GMG Plywoods Pvt. Ltd.) (From: Left to Right).

Mr. Aditya Bansal (RP Wood Products Pvt. Ltd.) with Padma Shri Sajjan Bhajanka.

Mr. Vivek Jain (Action Tesa- Balaji Action Buildwell) with Padma Shri Sajjan Bhajanka.

Mr. M.L. Gattani (Gattani Industries) with Padma Shri Sajjan Bhajanka.

Mr. Suresh Bahety (Plyinsight), Dr. M.P. Singh (FIPPI), Mr. Rajesh Mittal (Greenply Industries Ltd.), Mr. N.K. Aggarwal (Action Tesa-Balaji Action Buildwell), Padma Shri Sajjan Bhajanka & Mr. Jaydeep Chitlangia (Duroply Industries Ltd.)From: Left to Right).

Mr. Neeraj Bansal (Recliners India) with Padma Shri Sajjan Bhajanka.

Mr. Yogesh Kumar (Plyinsight), Mr. Suresh Bahety (Plyinsight), Mr. Manoj Thakur (Plyinsight) with Padma Shri Sajjan Bhajanka.

FIPPI team with Shri Sajjan Bhajanka.❑

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY (FIPPI)

FIPPI LEADERSHIP

Mr. Sajjan Bhajanka
Chief Patron, FIPPI

Mr. N.K. Aggarwal
Patron, FIPPI

Mr. S.P. Mittal
Patron, FIPPI

Mr. M.S. Vagh
Patron, FIPPI

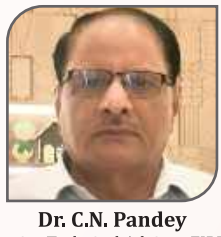
Mr. Rajesh Mittal
President, FIPPI

Mr. Jaydeep Chitlangia
Senior Vice President, FIPPI

Mr. Jikesh Thakkar
Vice President, FIPPI

Mr. Keshav Bhajanka
Vice President, FIPPI

Dr. M.P. Singh
Director General, FIPPI



Dr. C.N. Pandey
Senior Technical Advisor, FIPPI

Minutes of the Committee Meeting of the Federation of Indian Plywood and Panel Industry, held on 10th July 2025 at the Taj Mahal Hotel, New Delhi, for Planning the Roadmap for the Year 2025

MEMBERS' PRESENT:

1. Shri Rajesh Mittal, President, FIPPI
2. Shri Jaydeep Chitlangia, Senior Vice President, FIPPI
3. Shri Jikesh Thakkar, Vice President, FIPPI
4. Shri Keshav Bhajanka, Vice President, FIPPI
5. Shri Krupesh Thakkar, Rushil Décor Pvt. Ltd.
6. Shri Madhusudhan Lohia, Merino Industries Ltd.
7. Shri Rajiv Daga, Archidply
8. Shri M.L. Gattani, Gattani Industries
9. Shri Gautam Gupta, Magnus International
10. Shri Naman Gupta, Magnus International
11. Shri Yogesh Arora, Greenlam Industries Ltd.
12. Shri Ashish Mishra, Greenlam Industries Ltd.
13. Dr. Purushottam Sharma, Greenpanel Industries Ltd.
14. Shri Sumant, Century Plyboards Ltd.
15. Shri Dhanesh Pandey, Century Plyboards India Ltd.
16. Shri Rahul Mehta, CEO, Furniture and Fittings Council (FFSC)
17. Shri Ramesh Aggarwal, President, AIPLI
18. Dr. Prashanth M., President, SIPMA
19. Shri Mujeeb Rehman, President, SOPMA and All Kerala Plywood Manufacturers Association
20. Shri T.P. Narayanan, President, North Malabar Plywood & Door Manufacturers
21. Shri Sandeep Gupta, UK-UP Plywood Manufacturer Association
22. Shri Aditya Aggarwal, UK - UP Plywood Manufacturer Association
23. Shri Navin Patel, Gujarat Plywood & Veneers Manufacturers Association
24. Shri Ankit Singhal, Association of Plywood Manufacturers Welfare Association, U.P
25. Shri Gajendra Singh, President, Wood Technologist Association
26. Shri Manoj Gwari, Wood Technologist Association
27. Shri Santosh Srivastava, Ply Reporter
28. Dr. M.P. Singh, Director General, FIPPI
29. Dr. C.N. Pandey, Senior Technical Advisor, FIPPI
30. Shri Ajay Kumar, Senior Economic Policy Advisor, FIPPI
31. Shri Pragath Dvivedi, Technical and Economic Advisor, FIPPI
32. Shri Anthony Fernandes, Office Secretary, FIPPI
33. Dr. Richa Bansal, Assistant Director, FIPPI
34. Shri Rishabh Gandhi, Economic Officer, FIPPI
35. Km. Kavita Goyal, Office Assistant, FIPPI

The Federation of Indian Plywood and Panel Industry (FIPPI) convened its Committee Meeting on 10th July 2025 at the Taj Mahal Hotel, New Delhi. The primary objective of the meeting was to review the progress of initiatives undertaken from January to June 2025 and to strategize and further finalize the action plan for 2025. The meeting brought together key office bearers, representatives from member industries and regional associations and invited experts to deliberate on issues critical to the growth, compliance, innovation, and sustainability of the plywood and panel sector. The agenda included discussions on organizational aspects of FIPPI (membership engagement and budget), Quality Control Order (QCO) implementation, product standardization, export promotion, skill development, sustainability and policy advocacy.

Opening Remarks by the Director General, FIPPI

Dr. M.P. Singh, Director General, FIPPI, formally opened the meeting by welcoming all attendees, including representatives from FIPPI's primary and affiliated member organizations. He specifically welcomed delegations from Gujarat Plywood & Veneers Manufacturers Association for attending the meeting for the first time.

He acknowledged the significance of convening the present meeting within six months of the previous committee meeting held on 17th January 2025 in New Delhi and emphasized the value of maintaining such regular engagement for the sustained progress of Indian plywood and panel sector.

Dr. Singh further extended his appreciation and gratitude to the office bearers of FIPPI – Shri Rajesh Mittal (President), Shri Jaydeep Chitlangia (Senior Vice President), Shri Jikesh Thakkar (Vice President) and Shri Keshav Bhajanka (Vice President) – for their enduring

leadership and complete support to FIPPI's Secretariat, which has enabled FIPPI to undertake a range of initiatives aimed at advancing the interests of the plywood and panel sector. He specifically acknowledged the presence of Shri Keshav Bhajanka, noting his participation in the committee meeting for the first time in his official capacity as Vice President.

In his remarks, Dr. Singh also recognised the consistent support extended by affiliated organizations. He elaborated how FIPPI has proactively engaged with regional associations through meetings held in Kerela (Kannur and Kochi) and Mysore, which focused on addressing challenges related to quality compliance and exploring ways in which FIPPI can support regional MSMEs. Through these engagements, FIPPI has effectively covered the southern region and is now receiving similar request from Gujarat. Dr. Singh affirmed FIPPI's commitment to supporting MSMEs in Gujarat. He thereafter invited Shri Rajesh Mittal to deliver his 'Presidential Address.'

1. Presidential Address by Shri Rajesh Mittal, President, FIPPI

Shri Rajesh Mittal commenced his address by extending a warm welcome to all esteemed members present at the meeting.

At the outset, he acknowledged the continued support of member organizations and regional associations, which has played a pivotal role in facilitating the implementation of the Quality Control Orders (QCOs) for plywood and panel products and assured that FIPPI would extend its full cooperation to facilitate their smooth transition towards compliance with the recently enforced QCOs. Shri Mittal emphasized the significance of QCOs by outlining their associated benefits, both in the short-term and long-term.

i. In the short-term, the QCOs are expected to increase domestic production, reduce imports through import substitution, create additional employment opportunities and expand green cover due to enhanced demand for raw materials used in wood panel products.

ii. In the long-term, the QCOs are likely to enhance the export potential of the sector, positioning India as a net-exporter of plywood and panel products by 2030

Shri Mittal further emphasized the need for the establishment of an institutional forum – a 'Development Council' for plywood and panel products industry – to address structural and policy-level challenges faced by the sector. He outlined that such a forum could serve multiple functions, including:

i. Facilitating effective inter-ministerial coordination

ii. Addressing critical issues such as raw material scarcity and monetization of carbon credits

iii. Supporting and monitoring QCOs compliance, strengthening domestic supply chains and advancing towards self-reliance

iv. Fostering forward linkages with the furniture sector and backward linkages with farmers engaged in agroforestry

He also highlighted the need for industry players to enhance product quality and foster innovation, stressing

the importance of learnings from advancements made by countries like China and Vietnam. In pursuit of this objective, two specialised delegations – comprising FIPPI leadership and technical experts from the industry – undertook study visits to Vietnam, which included:

i. The Production and Quality Excellence Tour, focused on gaining firsthand exposure to plywood manufacturing techniques, adhesive technologies and export-ready furniture production models

ii. The Raw Material Sustainability Tour, aimed at understanding how government policies, land use strategies and industry frameworks have positioned Vietnam as a global leader in sustainable wood production

Shri Mittal reaffirmed FIPPI's commitment to encouraging innovation in technology and production processes in the sector and noted that FIPPI would continue to undertake focused efforts in this regard. Shri Mittal encouraged all members to engage constructively in the deliberations and contribute meaningfully to the issues before the sector. He concluded his address by inviting Dr. M.P. Singh to take the discussion forward.

2. Release of the Quarterly Magazine – Indian Wood & Allied Panels (Volume 19, Issue 2, April – June 2025)

Dr. M.P. Singh invited the members present to formally release the latest edition of FIPPI's quarterly magazine, Indian Wood & Allied Panels, covering the period from April to June 2025.

He described the publication as the official quarterly journal of FIPPI, often referred to as the 'Voice of FIPPI,' as it covers key activities, initiatives, events and policy engagements undertaken by FIPPI during the reporting period. He encouraged all members to take time to review the magazine, noting that the issues highlighted therein would serve as the foundation for several of the deliberations scheduled in the current meeting.

Dr. Singh further outlined the key highlights of the April – June 2025 edition, which include:

i. Insightful articles contributed by technical experts on quality & standards, sustainability and export potential

ii. Detailed reports on both of FIPPI's study visits to Vietnam

iii. FIPPI's article defining the preservative treatment regimes in plywood standards covering IS 303, IS 4990, IS 710 and IS 1659

iv. FIPPI's proposed amendments to IS 1659 related to block boards

v. FIPPI's formal response to the representation submitted by AMFT (Association of Furniture Manufacturers and Traders) concerning overlap of technical and general products under the QCOs

vi. Details of the project awarded to ICFRE (Indian Council of Forestry Research and Education) for the development of a methodology for agroforestry-based carbon offset projects

vii. Key recommendations submitted by FIPPI on ECO-mark criteria for wood-based panels

viii. Updates on policy advocacy measures taken by FIPPI to prevent the import of non-BIS-compliant wood panel products

ix. A summary of the webinar conducted by FIPPI on 'World Environment Day' including an article titled: 'Environmental Compliance for Plywood & Panel Industry - With Resin & Without Resin.'

3. Action Taken Report on FIPPI Roadmap

Dr. M.P. Singh presented the 'Action Taken Report' to the forum, providing an overview of the key activities undertaken by FIPPI since the last committee meeting, along with the FIPPI's action plan for the near future.

He informed the members that the report would be structured around five thematic goals forming the foundation of the 'FIPPI Roadmap,' namely: i) membership engagement and communication (organizational aspects); ii) innovations, product standardization & implementation of QCOs; iii) sustainability initiatives; iv) policy advocacy & institutional change; v) taxation & trade and vi) FIPPI's financial review and budget planning.

Dr. Singh noted that each of these focus areas would be addressed in detail during the meeting and that member inputs would be vital in shaping the way forward.

i) Membership Engagement and Communication (Organizational Aspects)

a. Membership Engagement

Dr. M.P. Singh apprised the forum of the membership drive undertaken by FIPPI in the recent past. As part of this initiative, FIPPI actively participated in prominent industry exhibitions such as MATECIA Bengaluru 2025 and India Wood Noida 2025, reached out to 22 companies — of which 5 have successfully been joined as primary members — and dispatched over 170 copies of the January - March 2025 edition of the Indian Wood & Allied Panels magazine across the industry. He underscored the importance of sustained outreach and engagement efforts to expand the FIPPI's membership base and ensure broader and more inclusive representation of industry stakeholders.

Dr. M.P. Singh opened the discussion by reiterating the current FIPPI membership fee structure, wherein primary members contribute 0.01% of their annual turnover, while affiliated members are not subject to any membership fee. He informed the forum that, during FIPPI's meeting with the North Malabar Plywood and Door Manufacturers Association, held on 5th May 2025 in Kerela, a proposal had been submitted suggesting that the minimum annual subscription fee for primary membership be revised from ₹1,00,000 to ₹50,000. This recommendation was intended to make membership more accessible for smaller enterprises. The forum expressed consensus in favour of the proposal, recognizing that a reduced threshold would encourage participation from firms with lower turnover and enable them to engage with FIPPI on the issues they face.

The committee proposed to increase the FIPPI's primary members from the current strength of 27 to 100 by the end of this year. Shri Jaydeep Chitlangia endorsed this objective and urged regional associations to contribute to this effort by encouraging at least 10 companies each from their regions to join FIPPI (Action Point:1). Shri Keshav Bhajanka agreed to the proposal to broad base the membership of FIPPI.

b. Communication Outreach

To strengthen its public outreach, Dr. Singh stated that FIPPI has been actively promoting its activities and objectives through social media channels. He further shared that two major initiatives—the FIPPI Coffee Table Book and the new FIPPI website – are nearing completion (Action Point:2). The Coffee Table Book will highlight FIPPI's journey, showcase industry profiles and include projections for the sector. Members expressed interest in the publication and Dr. Singh invited them to submit advertorials for inclusion.

FIPPI plans to continue showcasing its initiatives and engaging with stakeholders at leading industry exhibitions like India Wood and MATECIA.

ii) Innovations, Product Standardization and Implementation of the Quality Control Order (QCO)

a. Monitoring of Imports Post-QCO

Dr. M.P. Singh initiated the discussion by highlighting the impact of QCO implementation on imports of plywood and panel products. It was observed that import volumes have declined significantly post-QCO, presenting an opportunity to scale up domestic production and expand exports, taking cues from countries like China, Vietnam and Nepal. Dr. Singh informed that FIPPI has written to the concerned ministries regarding illegal imports from these countries.

Shri Keshav Bhajanka proposed that import trends should be closely monitored over the next three months to evaluate compliance and enforcement effectiveness. He further recommended that various industry bodies and regional associations could independently write to the Ministry to raise concerns about the continued inflow of non-compliant imports, thereby reinforcing the industry's collective stance on strict QCO enforcement (Action Point:3).

b. Awareness Drive for Promoting BIS-Cerified Wood Panel Products

Shri Rajesh Mittal emphasized the collective

responsibility of the industry to raise awareness about the importance and benefits of purchasing only BIS-certified plywood and panel products. He noted that awareness efforts should be targeted at three key stakeholder groups — traders, specifiers and end consumers. Supporting the suggestion, Shri Jaydeep Chitlangia underscored that wood panel purchases are typically one-time or infrequent decisions for consumers. Therefore, it becomes critical to ensure that they are well-informed about the quality, safety and regulatory compliance associated with certified products.

To achieve this objective, Shri Mittal proposed issuing a press release and engaging proactively with media outlets to generate wider public awareness about the benefits of certified wood panel products. Shri Chitlangia recommended placing a one-page advertisement in high-circulation trade publications such as Ply Reporter or Ply Insight, showcasing the advantages of QCO implementation and its positive implications for the industry (Action Point:4). He also suggested leveraging social media platforms to disseminate key messages and address broader issues facing the sector. Members supported the proposal and further recommended preparing regional language versions of the press release to ensure maximum outreach and impact across different parts of the country.

c. Addressing the Skill Gap in the Plywood and Panel Sector

Dr. M.P. Singh raised the issue of skill shortages in the plywood and panel industry and invited Shri Rahul Mehta, CEO of the Furniture & Fittings Skill Council (FFSC), to brief the members on ongoing and potential skill development initiatives.

Shri Mehta gave an overview of FFSC's mandate under the Government's Skill India Mission. He acknowledged a significant skill gap in the plywood and panel sector and emphasized the need to extend skilling efforts beyond furniture and interiors. He proposed collaborating with FIPPI to create customized training programs and course development for the plywood sector, which would require government funding support and industry-research partnerships. FFSC currently operates over 12 training centres across India, enrolling approximately 1,500 trainees annually, which falls short of industry demand. This is one of the challenges which should be addressed in the near future.

Shri Rahul Mehta suggested formalizing the collaboration through an MoU. He emphasized the need to identify key skill gaps, prepare a budget and quickly move toward execution. Industries were encouraged to come up with their requirements in terms of manpower training and carpenter skilling.

Shri Rajesh Mittal endorsed the proposal and supported initiating the MoU process with FFSC (Action Point:5). He stressed the importance of budget planning to implement an effective skill development framework tailored to the panel industry.

d. Development of New Standards

Dr. M.P. Singh presented updates on the development of new standards. He showcased products currently covered under the QCO and invited industry members to suggest additional products that should be brought under its ambit.

He highlighted that FIPPI, in collaboration with IWST, has sponsored projects for developing standards on Flexi-Ply, Fire Retardant MDF & Particle Boards, High-Density MDF, Pre-laminated Plywood and also submitted a draft on Laminated Flooring Coverings as per the details below:

- Development of Standard on Flexi-Ply (M/S Green Ply has sponsored this project to IWST).
- Development of Standard on Fire Retardant MDF & Particle Board (Project sponsored to IWST by M/S Century Ply, M/S Greenpanel, M/S Green Ply, M/S Greenlam, M/S Rushil Décor Pvt. Ltd, M/S Merino, M/S Balaji Action Buildwell).
- Development of Standard on High-Density MDF (Project Sponsored to IWST by M/S Action Tesa).
- Draft standard for Submission to BIS CED 20 by FIPPI DRAFT LAMINATED FLOORING COVERING – SPECIFICATION & REQUIREMENTS.
- Development of Pre-laminated Plywood – Specification (M/S Green Ply has sponsored this project to IWST).
- Evaluation of Properties of Bagasse Particle Board Manufactured in India by MSMEs, sponsored by Indian Bagasse Board Manufacturers Association (IBBMA) to IWST.

Members suggested that a new standard for hollow particle boards should also be developed and included under QCO (Action Point:6).

e. Revision of Existing Standards

For the revision of already existing standards, FIPPI has Proposed Revision of Existing Standards to Improve Clarity or Address Industry Concerns. Protection of plywood against biological agencies through Glue Line Treatment including revision of preservatives retention norms for Marine Grade Plywood Standard - IS 710 & Shuttering Grade Ply Standard - IS 4490.

FIPPI proposed that during the interim period of ongoing revisions, the preservative clause in IS 4990 and IS 710 may be made optional, based on mutual agreement between buyers and manufacturers, to ensure continuity in supply chains.

Dr. M.P. Singh told members that the Bureau of Indian Standards (BIS) has withdrawn the exception provided in IS 303:2024 (with Amendment No. 1, 2025) regarding 4 mm plywood used as the base for veneered decorative plywood and it has been shifted appropriately to IS 1328. Shri Rajesh Mittal suggested all members to manufacture 4 mm ply and informed that Greenply Industries Limited has augmented its manufacturing capacity and is now fully equipped to supply 4 mm plywood compliant with IS 303:2024 standard. He further offered technical support to other members for the manufacturing of 4 mm plywood. Dr. M.P. Singh told the members that the draft amendment no.-2 to IS 303: 2024 is in wide circulation and all the members are requested to give their comments.

To finalize key decisions regarding IS 4990 and IS 710, the BIS Subcommittee CED 20: P1 proposed holding special joint online meetings with relevant user groups. The date for the meeting has been scheduled for 1st August 2025. Dr. Singh requested all members to share the contact details—Name, Mobile Number, and Email ID—of relevant users' industry/organization with the BIS Secretariat to ensure that invitations for the joint meetings can be sent in a timely manner (Action Point:7).

f. Developing capabilities to meet furniture sector demands

FIPPI held a meeting with stakeholders from plywood, MDF and particle board industries who deliberated upon the issues raised by AFMT for developing capabilities to meet furniture sector demands. The discussions centered around the development of new products such as prelaminated plywood, synchronized melamine faced plywood and birch plywood used in routing and toy manufacturing, which is currently imported from Russia. Particle board discussions focused on products including pre-laminated particle boards, electrostatically dissipative particle boards, fire rated particle board in plain and pre laminated variety, nitrogen excimer energy coated decorative particleboard including their specifications, applications, and testing requirements. The discussion on MDF boards focused on fire rated MDF in plain and pre laminated variety, concerns about laser cutting marks on MDF products made from indigenous timber species, and nitrogen excimer energy coated decorative MDF.

Dr. M.P. Singh requested the members to produce samples of these products for display at upcoming industry exhibitions or through advertisements to highlight domestic manufacturing capabilities. The industry representatives confirmed their preparedness to initiate production of the relevant products based on AFMT's specifications and anticipated demand.

Dr. M.P. Singh suggested that the industries should work together with IWST for developing such products. A group of two-three members from each industry can be formed to work together on one specialized product to expedite the innovation, development and deployment. Dr. Singh also suggested that a follow-up meeting of the sub-committee is necessary to discuss the AFMT representation, enabling the industry to address and meet the proposed demand effectively (Action Point:8).

g. BIS Support for Micro-Entrepreneurs

FIPPI has requested BIS to support micro and small

plywood manufacturers through relaxation in Scheme of Inspection and Testing (SIT) requirements, establishment of common facility centres for product testing, provision of extended transition periods and a more inclusive and consultative regulatory processes.

Dr. M.P. Singh informed the members that FIPPI had participated in meetings with regional associations in South India to raise awareness about the implementation of Quality Control Orders (QCO) and to support micro-entrepreneurs by facilitating the development of cluster laboratories in collaboration with Kannur University under funding from Greenply Foundation at the approximate cost of 30 lakhs.

Members from the Gujarat association raised issues regarding the door industry, specifically commercial doors in detail. He said that 30-40% of the industries from Gujarat are manufacturing this product and they are not able to pass the specifications required in the standards. The members suggested that first we should discuss the plan of action and clarify whether BIS requires a technical justification or a formal letter to address this concern.

Dr. M.P. Singh informed the members that the issue concerning doors can be addressed with technical support from IWST, which is also organizing an interactive session on 18 July 2025, with the wood panel sector on 'Technical Compliance of Quality Control Order.' He further urged members from all industries to actively participate in the webinar to gain clarity on their concerns. Dr. M.P. Singh stated that, based on suggestions received from the industry, IWST and FIPPI will work together to understand the technical limitations and work towards resolving the identified issues (Action Point:9).

h. Development of Test Method for E0 Emission Class

The committee discussed the current use of E1 and E2 class emission in BIS standards and the hazardous implications related to E2 class which is very carcinogenic. The members strongly advocated for the development of a testing method for E0 class, citing serious health and environmental concerns related to the E2 emission class. Dr. M.P. Singh informed the members that a meeting was held with ARCL Organics Pvt. Ltd. to explore collaborative opportunities to sponsor a project at IWST for the development of testing methods for E0 emission class, with the aim of aligning them with international standards. Members proposed that standards should progressively phase out E2 and move toward E1 and E0 classes. In the case of MDF and particle boards, E1 should be the minimum benchmark.

The committee agreed on adopting a phased approach for awareness and implementation of emission standards. It was recommended to first launch an industry-wide awareness campaign focusing on E1 and E2 formaldehyde emission classes. Once a clear understanding is established across the sector, efforts should be initiated to develop a robust testing methodology for E0 standards. Gradually, the industry can then work towards achieving E0 emission benchmarks across all applicable product categories. The members also suggested that for plywood, all three classes—E0, E1, and E2—should be included to provide a structured framework for compliance (Action Point:10).

iii) Sustainability Initiatives

a. Strategic Framework for Industry-Led Plantation Drives

Dr. M.P. Singh initiated the discussion by emphasizing the urgent need to compile and maintain comprehensive data on plantation drives and green initiatives undertaken by FIPPI members. The writeup for plantation activities taken up by Century Plyboards India Ltd., Greenply Industries Limited, Merino Industries Ltd., Action Tesa Buildwell and Rushil Decor Limited have been provided so far. Dr. M.P. Singh requested other members to provide a write-up on plantation activities to be published in FIPPI's quarterly magazine to showcase the industry's collective contribution to enhancing green cover. Members endorsed the proposal and agreed to submit regular data on their respective plantation initiatives to FIPPI (Action Point:11). He further noted that maintaining such records would significantly strengthen FIPPI's ability to communicate the sector's environmental impact and sustainability efforts during engagements with government stakeholders.

Dr. Singh also pointed out that, in many forums, the paper industry claims to lead sustainability efforts while accusing the plywood and panel sector of depleting their raw material sources. Therefore, he emphasized that FIPPI must actively promote its own green initiatives to counter this perception and enhance public awareness. Shri Rajesh Mittal supported this view, stating that the industry must be more proactive in communicating its efforts to government bodies and other stakeholders. Shri Mittal suggested conducting sustainability workshops and establishing nurseries in collaboration with regional associations — not only to ensure raw material availability but also to enhance the long-term sustainability of the industry (Action Point:12).

b. R&D for Clone Development Specific to Plywood and Panel Industry

Dr. Singh emphasized the urgent need for independent R&D to develop clones specifically tailored to the plywood and panel industry, rather than relying on clones developed by the paper industry. He proposed initiating a dedicated research project to identify suitable clones. Shri Ashish Mishra endorsed this idea and highlighted the current lack of R&D capacity within the industry. He stressed that the project should be time-bound and aimed

at delivering fast-track results. Shri Keshav Bhajanka and Shri Rajesh Mittal also supported this proposal.

Shri Madhusudhan Lohia underlined the importance of regional participation since clone suitability may vary geographically. Additionally, Shri Jikesh Thakkar suggested exploring alternative raw materials beyond those currently used by the paper industry, while Shri Mishra recommended including short-rotation clones in the research agenda.

Members agreed to launch a dedicated, time-bound R&D project focused on developing plywood- and panel-specific clones. Shri Rajesh Mittal recommended forming a sub-committee to oversee the initiative and called on regional associations to contribute financially to a common fund to support the project. This collective funding approach is intended to encourage regional ownership and accountability.

Accordingly, Dr. M.P. Singh proposed establishing a Memorandum of Understanding (MoU) with the Indian Council of Forestry Research and Education (ICFRE) to strengthen collaboration on raw material sustainability and facilitate the development and extension of sector specific clones (Action Point:13).

c. Other Sustainability Initiatives

Dr. M.P. Singh informed the members that FIPPI has invited proposals for the establishment of a Plantation Monitoring and Advisory System (PMAS) through its magazine and is seeking a technically capable organization to undertake this task.

He further stated that the FIPPI has submitted its comments on the draft technical criteria for granting the ECO Mark for wood and wood substitute products released by the Central Pollution Control Board (CPCB). FIPPI has also proposed to submit a detailed framework and certification matrix for wood substitutes, including specific criteria, indicators, and verifiers.

A project has been allocated to the Indian Council of Forestry Research and Education (ICFRE) for the development of a methodology for agroforestry-based carbon credit projects under the offset mechanism of the Carbon Credit Trading Scheme for the Indian Carbon Market with initial funding from Green Panel Ltd, Green Ply Ltd and Century Ply India Ltd. We request Greenlam Ltd and Merino Ltd to support this endeavour.

Dr. Singh expressed gratitude that the Government of India is actively exploring workable solutions to the long-standing issue of wood scarcity faced by the wood-based industries (WBIs). In the absence of a clear framework to enable collaboration between WBIs and farmers for undertaking plantations, any imposition of mandatory plantation obligations may prove counterproductive. Considering this, FIPPI submitted a representation to the Hon'ble Minister of Commerce & Industry, advocating for the promotion of agroforestry through either a legislatively backed framework or a market-based credit scheme to ensure the sustainability of raw material supply for WBIs.

Additionally, FIPPI has requested the Ministry of Environment, Forest and Climate Change (MoEFCC) to simplify the certification process for Trees Outside Forests (ToF) under the Indian Forest and Wood Certification Scheme (IFWCS). FIPPI recommended streamlining the Criteria, Indicators, and Verifiers (CIVs) specific to ToF certification, with a focus on enabling the issuance of a Certificate of Origin and ensuring traceability through a Chain of Custody mechanism.

To fully harness the potential of agroforestry in India, FIPPI emphasized the need for the implementation of the National Agroforestry Policy (2014) by enacting a dedicated Agroforestry (Facilitation and Promotion) Act. Such legislation should empower farmers through a structured framework that enables the issuance of electronic Certificates of Origin and Ownership, certification of nurseries, seeds, and planting materials through an institutional registration and accreditation mechanism, and provide a legal framework for hassle-free transportation, marketing, and utilization of wood grown on non-forest lands.

iv) Policy Advocacy and Institutional Change

a. Constitution of the Development Council for Plywood and other Panel Products Industry under the Industries (Development & Regulation) Act, 1951

FIPPI has been working on the reconstitution of the Development Council for Plywood and other Panel Products Industry under Section 6 of the Industries (Development & Regulation) Act, 1951. In the past, the Development Council was formed in November 1993 under Section 6 of the Industries (Development and Regulation) Act, 1951, for a tenure of two years. During this period, three meetings were held, and multiple sub-committees were formed which undertook substantive work, including promoting plantation on degraded land, studying rationalization of duties, and formulation of export strategies. Following the expiration of the initial term and considering the significant work carried out by the Council, it was reconstituted in October 1996 for another term of two years. One meeting was held in February 1997 following the Supreme Court judgement in the Godavarman vs. Union of India case. However, the tenure of the reconstituted Council ended in October 1998, and since then, the Council has not been revived. The non-revival of the Development Council after 1998 led to the absence of an institutional platform to represent the industry's concerns, resulting in fragmented communication, delayed policy interventions, and a lack

of coordinated support from relevant ministries, impeding the industry's ability to respond effectively to evolving challenges and opportunities.

In this regard, a delegation from FIPPI will meet the Hon'ble Minister of Commerce & Industry Shri Piyush Goyal Ji on Thursday, 10th July 2025 at 3:30 PM (IST) in the Honourable Minister's Chamber, New Delhi, to submit their representation regarding the constitution of the Development Council for the plywood and panel sector. FIPPI delegation will include:

1. Chief Patron: Sajjan Bhajanka, Chairman, (Centuryply) (PadamShri Awardee)
2. Patron: Shri NK Aggarwal, CMD, (Action Tesa)
3. President: Shri Rajesh Mittal, CMD, (Greenply)
4. Senior Vice President: Shri Jaydeep Chitlangia, (Duroply)
5. Vice President: Shri Jikesh Thakkar, (Rushil Décor)
6. Vice President: Shri Keshav Bhajanka Executive Director (Centuryply)
7. Director General: Dr M.P.Singh IFS (Retd)
8. Affiliated Association: Dr. Prashanth President (SIPMA)
9. Affiliated Association: Shri Ramesh Agarwal President (AIPLI)
10. Shri Krupesh Thakkar CMD (Rushil Décor)
11. Shri Madhusudan Lohia Director (Merino)

The committee endorsed the initiative to reconstitute the Development Council for Plywood and other Panel Products Industry under Section 6 of the Industries (Development & Regulation) Act, 1951.

v) Taxation and Trade

a. GST Rationalization for Plywood & Panel Products

Dr. M.P. Singh informed the members that FIPPI is currently working on finalizing a framework for policy advocacy to engage with government authorities regarding the rationalization of the GST rate on plywood and panel products, with a proposal to reduce the rate from 18% to 5% (Action Point:14).

He also informed the members that non-sustainable alternatives to wood panels, such as acrylic panels, are currently taxed at the same GST rate of 18%. He stressed the importance of highlighting to the government that wood panels are a more sustainable option, as their raw materials are sourced from plantations.

b. Establishing a Dedicated Export Promotion Council for Plywood and Panel Sector

Under the Industry and Trade theme, Dr. Singh highlighted the need for a separate Export Promotion Council (EPC) dedicated specifically to the Indian plywood and panel sector. Currently, the industry falls under CAPEXIL, which broadly covers chemical-based industries — an inappropriate categorization for the wood-based plywood and panel industry. This misalignment restricts the sector from receiving targeted attention and support.

Shri Ajay Kumar and Shri Madhusudan Lohia supported the creation of a new EPC and suggested that laminates, currently under Plexconcil, should also be brought under the same council along with plywood and panel products. Shri Madhusudan further proposed that wooden handicrafts and furniture be considered for inclusion as well. Dr. Singh agreed but noted that while representatives from the furniture industry have been recommended for inclusion in the proposed Development Council, their consensus on joining a joint export promotion initiative still needs to be confirmed.

Members agreed to move forward with advocating for the establishment of a dedicated EPC for the plywood and panel sector, including laminates and potentially wooden handicrafts and furniture (Action Point:15). It was decided to initiate consultations with stakeholders from these related segments to seek their agreement and support.

c. Enhancing Export Incentives for the Plywood and Panel Sector

Shri Krupesh Thakkar highlighted concerns regarding insufficient incentives under the RoDTEP (Remission of Duties and Taxes on Exported Products) Scheme. He suggested that the industry should quantify the actual unreimbursed duties to build a data-driven case for enhancing the current benefit rates.

In support of this, Shri Rajesh Mittal proposed forming a sub-committee dedicated to improving export incentives for the sector (Action Point:16). This group would assess the maximum possible benefits under RoDTEP and devise a structured policy advocacy plan aimed at boosting exports from the plywood and panel industry.

vi) FIPPI's Financial Review and Budget Planning

Dr. M.P. Singh presented the Financial Statement for the year 2024–25.

The committee deliberated on the utilization of existing financial reserves. It was collectively noted that FIPPI has accumulated surpluses from previous years amounting to ₹50 lakhs and a sustainable approach should be taken for managing this resource. The members agreed to place the ₹50 lakhs surplus from previous years into Fixed Deposits after clearing the outstanding under fixed assets. The Committee endorsed the provisional Expenditure & Income Statement for FY 2024-25 and suggested to submit the duly audited financial statement for the FY 2024-25 for the approval in the Annual General

Meeting (2025). During the discussion on the budget, Shri Keshav Bhajanka emphasized that FIPPI's activities should not be curtailed due to limited revenue. He suggested that, if necessary, the membership fee structure — which currently stands at 0.01% of the annual turnover of primary members — could be reviewed and increased to ensure continued support for FIPPI's initiatives. Dr. M.P. Singh assured that all possible efforts will be made to finance the deficit through strengthening of the membership drive.

Closing Remarks

The meeting concluded with a vote of thanks to the Chair and hon'ble members, acknowledging their valuable contributions and active participation. Dr. M.P. Singh requested all members to participate actively in the upcoming Sub-Committee meeting on Product Innovation, Standards, and Sustainability, scheduled to take place in the next session at 3:00 PM.❑

FIPPI Convenes Sub-Committee Meeting on Product Innovation, Standards & Sustainability on 10th July 2025 in New Delhi

Following the FIPPI Committee Meeting held in the morning on 10th July 2025 at the Hotel Taj Mahal, Man Singh Road, New Delhi, FIPPI convened a sub-committee meeting on the same day in the afternoon focused on "Product Innovations, Standards and Sustainability." This session brought together several leaders and delegates from the industry and regional associations across different parts of the country to discuss the critical issues currently faced by the industry. The discussion emphasized achieving superior product quality, ensuring raw material sustainability and fostering industry growth in the long term.

The session was moderated by Shri Pragath Dvivedi (Founder & Editor-in-Chief, Ply Reporter and Technical & Economic Advisor, FIPPI) and Dr. C.N. Pandey (Senior Technical Advisor, FIPPI). Shri Pragath Dvivedi set the tone by initiating the session, speaking on the learnings that he got from Padma Shri Awardee Shri Sajjan Bhajanka (Chief Patron, FIPPI & Chairman, CenturyPly). He recalled the time when Shri Bhajanka once told him about his inspiring journey of overcoming bankruptcy and rebuilding his factory, highlighting resilience and determination. Then, he opened the forum for discussion and encouraged the delegates present to participate actively to make it more interactive.

The discussion started on product quality, with Shri Makhan Gattani (Managing Director, Gattani Industries) emphasizing the importance of adhering to BIS standards and understanding key metrics like strength, bonding and MOR/MOE. This was followed by an interactive discussion on Standard Operating Procedures (SOPs), where Dr. C.N. Pandey emphasized that quality is an achievable goal for every company.

A key point of discussion revolved around adapting to Quality Control Orders (QCOs) and improving the supply of raw materials. Shri Manoj Gawri (Secretary, Wood Technologist Association) and Shri Neeraj offered differing views on the impact of QCOs, while several members highlighted challenges related to timber availability and species suitability, particularly in regions like Assam and Kerala. The idea of engaging with agroforestry companies and holding a "knowledge camp" was proposed to address these sourcing issues.

Sustainability then became a central theme of discussion, with Shri Ashish Mishra (Vice President – Sustainable Wood Sourcing & Plantation, Greenlam Industries) providing comprehensive guidelines on how every company can work on sustainability. He stressed the need for collective effort, the establishment of "wood baskets" and a robust supply chain built on strong relationships with farmers as the need of the hour. Dr. Purushottam Sharma (Head – Product Development & Research, Greenpanel Industries) also contributed, recommending that companies should plant 1.5 times more saplings than they harvest. The forum also discussed government initiatives like the agroforestry mission and a proposal to divert a small percentage of agricultural land for tree plantation to benefit both farmers and the industry.

In conclusion, Shri Shiv Prakash (Greenply Industries) underscored the importance of improving industrial culture and focusing on skill development. Dr. Richa Bansal (Assistant Director, FIPPI) closed the session by extending her gratitude to all participants for their valuable contributions. The discussion successfully identified key challenges and laid out a clear path forward, focusing on collaboration, innovation and a shared commitment to a more sustainable and high-quality future for the industry.❑

FIPPI Meeting with Door Manufacturers from Gujarat on 25th July 2025 – Supporting QCOs

Implementation and Advocating Standard Amendments

FIPPI, in collaboration with IWST, visited door manufacturing units in Gujarat to support QCO implementation and address technical challenges faced by MSMEs. Discussions focused on identification of technical limitations and challenges faced by manufacturers and discussions on proposed amendments to existing standards to align with practical industry needs particularly for Wooden Flush Doors (IS 2202 & IS 2191), which currently made using either of plywood, particle board and MDF as infill materials to the core of the doors, which restrict the manufacturing using the different combinations of these materials as infill materials. IS 2202 does not incorporated critical parameters such as recycled wood usage, mixed core materials and commercial door tolerances for low-cost housing.

It was highlighted that the standards are managed by CED 11, a committee lacking sufficient representation from the wood-panel sector, resulting in impractical specifications. Manufacturers recommended transferring the standards to CED 20, which has domain expertise in wood-based products, and sought revisions to accommodate commercial-grade doors, agro-based wood, and recycled materials, along with a 6–9-month extension in QCO compliance for MSMEs.❑

Skill Development Partnership with FFSC: Empowering the Workforce

Signing of the Memorandum of Understanding (MoU) between FIPPI and FFSC on 18th July 2025-marking a key step in advancing skill development for India's plywood and panel sector.

FIPPI proudly signed a Memorandum of Understanding (MoU) with the Furniture & Fittings Skill Council (FFSC) during the 10th Foundation Day Celebrations of FFSC to advance comprehensive skill development across the plywood and panel sector. This strategic partnership is designed to build a certified, future-ready workforce that directly supports the national vision of Aatmanirbhar Bharat and the growth of India's manufacturing ecosystem.

Through this collaboration, FIPPI and FFSC are working closely to align training programs with evolving industry requirements, enhance employability and improve productivity. The partnership aims to strengthen the sector's skilled manpower foundation, supporting MSMEs and fostering long-term competitiveness and innovation.❑

FIPPI Signs MoU with IWST for Collaborative Research

This MoU marks a milestone in industry–research cooperation, aimed at enhancing product quality, ensuring environmental safety, and building global competitiveness for India's wood-based panel industry

Signing of the Memorandum of Understanding (MoU) between FIPPI and IWST on 8th August 2025- marking a step in advancing collaborative research and development in the plywood and panel sector.

The Federation of Indian Plywood & Panel Industry (FIPPI) has signed a Memorandum of Understanding (MoU) with the Institute of Wood Science and Technology (IWST), Bengaluru, marking an important step towards strengthening industry–research collaboration in the wood-based panel sector.

Through this partnership, FIPPI and IWST will jointly work on projects of national and industrial importance that directly address the needs of manufacturers, consumers, and regulators. The first initiative under the MoU focuses on developing an Indian Standard for assessing formaldehyde emissions using the desiccator method. This method, already recognized by international standards such as JIS and ISO, offers a reliable, faster, and cost-effective approach for evaluating formaldehyde emissions from wood-based panels like plywood, particleboard, and MDF.

Formaldehyde emission standards are a critical aspect of product quality, consumer safety, and environmental protection. While India currently uses methods such as the perforator and chamber methods, introducing the desiccator method will provide the industry with an additional standardized tool aligned with global practices. This development will not only help manufacturers in improving product quality and meeting international benchmarks but also ensure safer indoor air quality for consumers.

The MoU symbolizes FIPPI's commitment to bridging the gap between industry and research institutions, fostering innovation, and promoting sustainability. It is expected that this collaboration will pave the way for future joint projects addressing technological challenges, standardization needs, and environmental concerns, thereby supporting the long-term growth and competitiveness of the Indian plywood and panel industry.❑

India's Wood Products in Global Trade: Trends, Challenges, and Opportunities

Shailendra Kumar[1] **Ankita Negi[2]** **Rajiv Pandey[2]**

Introduction

India's economy is one of the fastest-growing major economies in the world and expanding rapidly. International Monetary Fund (IMF) predicted that India's GDP is expected to the third largest economy in the world in near future. Furthermore, the government's ambitious plan to realize the Viksit Bharat aim necessitates ongoing infrastructure development, a boom in the housing industry, with net carbon neutrality, will mesmerising wood demand for wood products. One of the world's largest producers and users of wood products, India mainly uses wood for paper & pulp, plywood and other wood-based businesses as well as for housing & construction industries. The wood-based industry supports for income and foreign exchange while supporting employment opportunities and livelihood. For centuries, Indian wood has shaped homes, temples, and artifacts. From the intricate rosewood carvings of Mysuru to the teak furniture of colonial-era homes, wood has always been part of India's cultural and economic fabric. Today, however, the story stretches far beyond tradition. With urbanization and rising incomes worldwide, the demand for sustainable wood-based products is growing across the country. Moreover, India, with its unique mix of traditional craftsmanship and modern industry, has a strong stake for the wood and wood products (specially for furniture and handicrafts) led evolving global market.

Understanding the import and export of wooden products is crucial for a country as it directly impacts economic planning and trade balance, assisting to assess whether the nation is a net importer or exporter and guiding fiscal and foreign exchange policies. It provides valuable insights for the availability and security of raw materials for key wood-based industries such as furniture, paper, and wood-based panels, enabling better planning and investment decisions. Data on wood and wood products trade facilitates for policy for ensuring the sustainability of forest resource use, besides checking illegal logging, and equipping forest management. It also aids in identifying opportunities for domestic industry development, value addition, and enhancing global competitiveness besides developing policies for sustainable utilisation of demand and supply of wood. Furthermore, monitoring trade flows ensures compliance with international regulations and certification systems, which are essential for maintaining market access and upholding the legality and traceability of wood products. On one side, exports attributes India's craftsmanship and manufacturing potential; and on the other, imports reflect the country's timber shortage and growing demand from booming construction, packaging, and furniture industries. Understanding these twin dynamics is essential to grasping India's position in the global wood economy.

In India, the accurate assessment of wood products in international trade is hindered by the wide variety of products differing in type, shape, size, and quality besides their measurement scale. These products, either wholly made of wood or containing wood components, are classified under various chapters of the HS code. However, due to the diversity in form and varied units of measurement—such as numbers, weight (kg, tonnes), volume (CUM), the actual quantity of wood used in each product is difficult to measure. This complexity is further compounded when products

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only partially contain wood, making it challenging to measure the volume of wood contained in the product. As a result, measuring the precise quantity and value of total wood in trade remains a significant challenge. Present analysis attempted to overcome the issue with aims to address data gaps using conversion factors for all traded wood products, evaluating their international trade (in terms of volume and value) and trade deficit, and also forecast India's future imports and exports of wood products.

Materials and methods

An extensive study was undertaken through the All India Coordinated Research Project titled "Assessment of demand and supply of timber, fuelwood and fodder in India (AICRP 12)", which is now concluded (2025). India's international trade in wood products, as compiled the Indian Trade Classification (ITC-HS) by the Directorate General of Commercial Intelligence and Statistics (DGCIS), of Government of India, spans three of the 21 trade sections comprising seven chapters—namely, Section IX (Chapter 44), Section X (Chapters 47–49), and Section XX (Chapters 94–96). These three sections cover seven chapters and contain a broad range of commodities, including wood and articles of wood, pulp and paper products, and miscellaneous manufactured wood items. Moreover, we complied data under various heads say for Panels and wooden products, which includes sheet for veneering; particle board; fiberboards; plywood, veneered panel and laminated wood; packing cases; builders' joinery; tableware; ornament of wood; fuel wood, in logs, in billets, in twigs, in faggots or in similar forms; wood in chips or particles sawdust and wood waste an scrap; wood charcoal; wood in rough; coniferous and non-coniferous; railway sleepers; wood sawn; and other article of wood. Trade data as quantity and value (in rupees and USD) on monthly basis for 390 wood-related commodities from FY 2000–01 to FY 2021–22 were extracted in terms of quantity and value from the DGCIS for analysis of import, export, and trade deficit. The quantities, originally reported in various units such as numbers, kilograms, tonnes, and cubic meters, were standardized into round wood equivalent (RWE) using conversion factors primarily sourced from FAO and ITTO. Where conversion data were unavailable, estimates were made based on average product dimensions, expert consultations, or theoretical approximations. Autoregressive Integrated Moving Average (ARIMA) model was applied for modelling for forecasting India's import and export of wood products.

Results and discussion

The analysis results that the total quantity and value of wood products under International Trade for India are to the tune of 61.64 million CUM RWE and ₹ 91611 Cr., respectively with the import and export share of 76% and 24% for quantity; and 60% and 40% for FY 2021-22. The quantity of import of wood products in FY 2021-22 was 46.72 million CUM RWE with the worth of ₹ 54730 Cr and the export is 14.91 million CUM RWE with the worth of ₹ 36880 Cr. The decadal growth of import from FY 2011-12 to FY 2021-22 was 212% for quantity (in million CUM RWE) and 221% for the worth (value in ₹ Cr.) and the growth from FY 2015-16 to FY 2021-22 was 138% for quantity (in million CUM RWE) and 118% for the worth (value in ₹ Cr.). The decadal growth of export from FY 2011-12 to FY 2021-22 was 488% for quantity (in million CUM RWE) and 519% for the worth (value in ₹ Cr.) and from FY 2015-16 to FY 2021-22 was 393% for quantity (in million CUM RWE) and 236% for the worth (value in ₹ Cr.). The increase in the imports of pulpwood along with the increase in paper & paperboard and panels and wooden products in recent period has led to a proportionate increase in import of wood products. The increase in export of wood products was largely attributed to increase in the exports of paper & paperboard with increase in commodities of panels and wooden products, printing material and furniture during recent periods.

Imports of wood and wooden products: Wood volume (RWE) and value (₹)

In FY 2021-22, the total quantity of approximately 60 million m3 RWE of wood products was traded internationally with import and export value for wood products was ₹ 91611 Cr. in international trade. The increase in wood product imports was mainly driven by pulpwood, however, in recent years, imports of paper & paperboard, and panels and wooden products have also increased. In FY 2021-22, the main imported wood products were pulpwood/ paper (₹25,719 Cr or 3,451 million US$), paper & paperboard (₹16,883 Cr or 2,265 million US$), and panels and wooden products (₹9,269 Cr or 1,244 million US$). The import quantity of panels and wooden products was 0.05 million m3 RWE in 2000-01 and was 9 million m3 in 2021-22; pulpwood imports increased from 0.4 million m3 to 30 million m3 RWE, and paper & paperboard imports increased from 0.1 million to 7 million m3 RWE during the same time period. The import quantity of wood products in round wood equivalent (RWE) increased significantly, increasing by about 326% since 2005–06, 211% since 2010–11, and 138% since 2015–16, with over 17% growth in just the last two years. The Compound Annual Growth Rate (CAGR) of wood quantity was around 7% since 2005–06, 6% since 2010–11, and 5% since 2015–16 to 2021-22. However, the CAGR over the

last two years has declined by 1% (Fig 1).

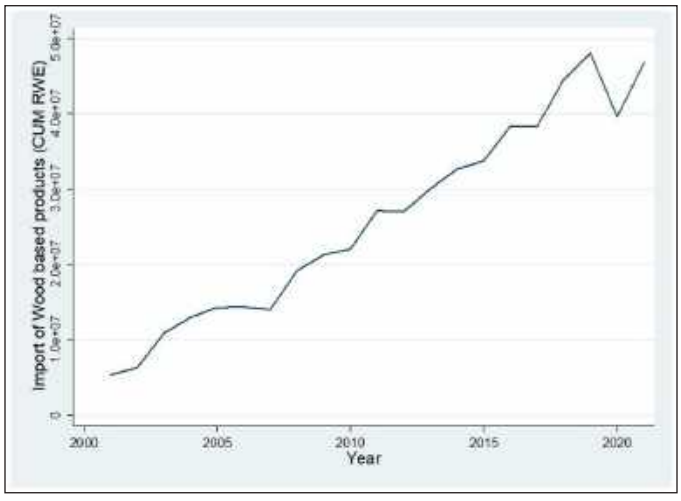

Figure 1: *India's Import of wood products.*

Exports of wood and wooden products: Wood volume (RWE) and value (₹)

The increase in export of wood products was largely attributed to an increase in the export of paper & paperboard. However, in recent periods, the contribution of panels and wooden products, printing material, and furniture have also been increased. In FY 2021-22, the main wood product in exports were paper & paperboard (₹23,687 Cr or 3,179 million US$), furniture (₹7,732 Cr or 1,045 million US$), printing material (₹2,410 Cr or 323 million US$), and panels and wooden products (₹2,360 crore or 316 million US$). The total export value was 4,948 million US$, with paper & paperboard contributing the most, followed by furniture and printing material. In terms of quantity (RWE), exports increased by about 919% since 2005-06, 488% since 2010-11, 393% since 2015-16, and 142% since 2020-21 to 2021-22. In terms of value, exports increased by 1,063% in Indian rupees since 2005-06 and 161% since 2020-21 to 2021-22, with a similar but lower growth trend in US dollar terms. The Compound Annual Growth rate (CAGR) in terms of the quantity in RWE in FY 2021-22 was around 15% since FY 2005-06; around 17% since FY 2010-11, 20% since FY 2015-16 and 33%, since last two years (Fig 2). India is not only exporting finished wood products like handicrafts, plywood, and furniture to markets in the US, Europe, and the Middle East, but it is also a major importer of raw timber and pulpwood from countries such as New Zealand, Canada, and Ghana. This dual role—an exporter of high-value products and an importer of raw material—makes India's wood trade unique and complex.

Trade Deficit in Wood products

India had a trade deficit in both the quantity and value of wood products due to domestic demand exceeding local supply. The quantity deficit in wood was generally increased from FY 2000-01 to FY 2021-22, with fluctuations until 2011-12, and with a steady annual rise of around 10% after 2011-12. The value deficit also showed an overall rising trend, with annual changes of about 10% (increase or decrease) in Indian Rupees and a sharp rise in FY 2021-22. A similar pattern was observed in US dollar, with annual changes ranging between 5% and 10%.

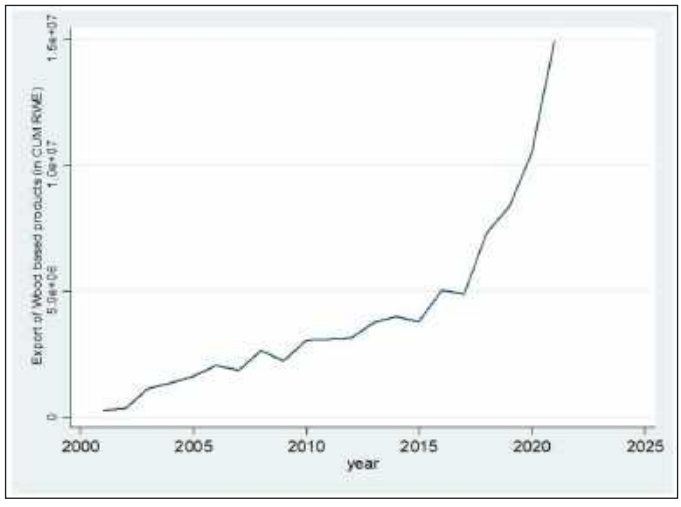

Figure 2: *Export of Indian wood products (2001-2021).*

Forecast of India's Imports and Export using Autoregressive Integrated Moving Average model (ARIMA) Model

India's import quantity is projected to increase from 46.4 million m3 RWE in 2023 to 60.7 million m3 RWE by 2027. While there is a general upward trend, the forecast indicates a slight dip in 2026, suggesting possible short-term fluctuations in demand or supply. Overall, the import volumes reflect India's continued reliance on international sources to meet growing demand of wood product in future. India's export of wood products is expected to steadily increase in near future. The export quantity is projected to increase from 17.5 million m3 RWE in 2023 to 27.7 million m3 RWE by 2027, indicating high growth in international demand of wood and wood products with India's expanding role in the global wood products market.

Panels and wooden products (Chapter 44) of the Indian Trade Classification (ITC-HS)

The panels and wooden products category is vital for understanding timber availability, industrial wood demand, and trade flows across states and countries, making it an important reference for policymakers, industry stakeholders, and researchers in the forestry and wood products sector and is the third broad categories of wood products that have maximum contribution in the export and import of wood product trade in India. The trend of import was observed to be

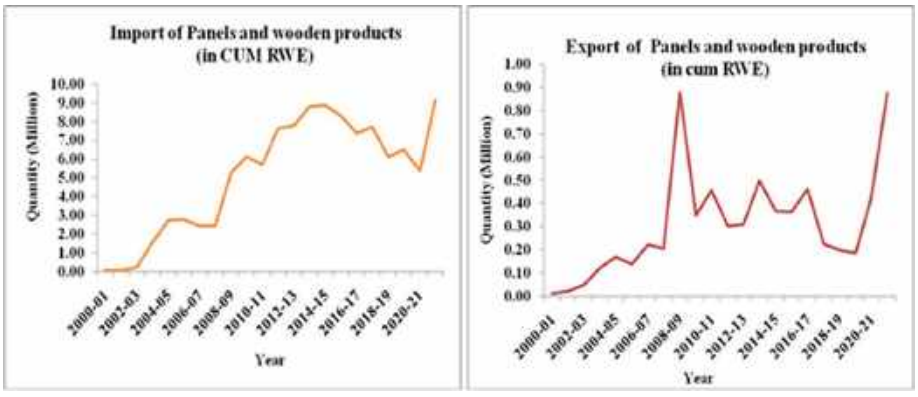

Figure 3: *Import & export quantity (in CUM RWE) of Panels & wooden products.*

increased consistently in initial two years (FY 2000-02) with a sudden increase in the import in the FY 2002-03 thereafter steady increase in quantity of import of commodities under wooden articles with maximum in FY 2021-22 was observed. However, export trend was inconsistent with two peaks during the reported period i.e. one is FY 2008-09 and a FY 2021-22 (Fig 3). The volume of wood products under import was higher than export during the period. The differences in traded quantity were increased till FY 2014-16 however thereafter decreased till FY 2020-21 with further increase in FY 2021-22 (Fig 4).

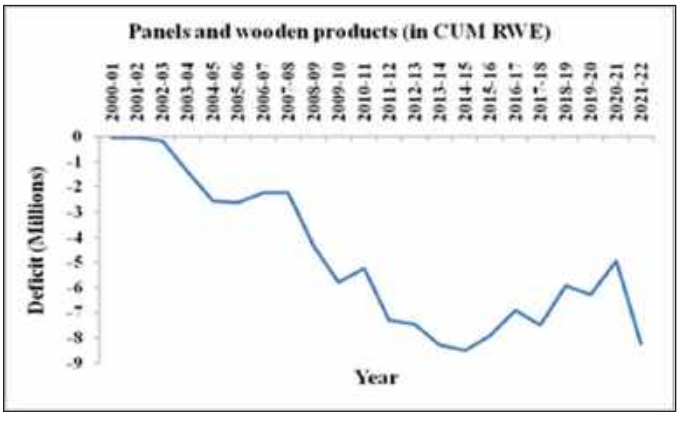

Figure 4: *Trade deficit in quantity (in CUM RWE) of panels and wooden products.*

The trade deficit in panels and wooden products, was varied mostly increasing since 2000–01 to 2021–22. Starting at less than one million CUM RWE in 2000–01, the shortfall deepened sharply through the mid-2000s and reached its lowest point of about 8–9 million CUM RWE around 2012–14. Although minor fluctuations occurred thereafter, the deficit remained consistently high, reflecting India's increasing dependence on imports to meet the demand for panels and wooden products (Fig 4).

India's wood products trade is at a crossroads. On one hand, imports remain high and the industry faces global competition. On the other, there's a clear window of opportunity, if India invests in plantation forestry, embraces sustainability, and builds efficient value chains, it can transform its position in the global wood economy. The intervention is also needed in form of balancing trade deficit, generating income and increasing employment opportunities. The future belongs to the countries that combine sustainability with innovation. With the right policies and industry strategies, India's wood sector can move from being a timber-deficient importer to a value-added exporter shaping global markets.

Conclusion

The analysis of international trade in wood products highlights India's growing dependence on imports to meet domestic demand, particularly for pulpwood, paper & paperboard, and processed wooden products. Despite a steady increase in exports—govern by paper, furniture, and printing materials—the trade balance remains negative, with the import volume and value consistently exceeding exports. The diversity in wood product types, units of measurement, and partial wood content presents challenges in accurately estimating trade quantities. However, by applying standardized conversion factors and analyzing long-term trends, a clearer picture of trade dynamics has emerged. Forecasts indicate that both imports and exports will continue to rise, reflecting the expanding role of wood products in India's economy and the need for strategic planning to ensure sustainable resource use and trade balance. The analysis suggests to develop policies for strengthening the plantation activities simultaneously facilitating the wood industries for different dimensions such as availability of raw material and other incentives.

Acknowledgement

Authors express gratitude to the Compensatory Afforestation Fund Management and Planning Authority (CAMPA), Ministry of Environment, Forest, and Climate Change (MoEFandCC), for their generous funding and support for the project titled "Assessment of Demand and Supply of Timber, Fuelwood and Fodder in India (AICRP-12).

References

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India's Plywood and Panel Imports in the Post-QCOs (Quality Control Orders) Era

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1. Import Market Overview and Regulatory Changes

1.1 Understanding the Demand-Supply Gap in India's Wood Panel Market

India, being one of the world's largest developing economies, is currently undergoing rapid urbanisation, driven by a young population and rising aspirations of middle-class households for home ownership and improvement. These structural shifts are acting as strong tailwinds for the country's real estate sector, which in turn fuels growth in the furniture industry. With nearly 65% of India's furniture market consisting of wood-based furniture, the rising demand for furniture directly drives the demand for wood panel products such as plywood, medium-density fibreboard (MDF) and particleboard.

However, import data from recent years points to a significant and growing reliance on imports, indicating the domestic industry's limited ability to ramp up production quickly. In FY 2024–25, India imported plywood and panel products worth ₹3,431 crore, registering a strong compound annual growth rate (CAGR) of over 14% over the last five years. This sharp increase highlights the significant demand-supply gap that developed in the Indian wood panel market during this period.

1.2 Regulatory Changes in the Post-QCOs Era

While the sharp rise in wood panel imports in recent years has been primarily driven by the growing demand-supply gap in the market, a significant portion of these imports consisted of sub-standard products. These low-quality wood panels were often dumped in large quantities at substantially lower prices by foreign manufacturers. This not only posed risks to consumers who use end-products made from such inferior materials but also created an unfair playing field for domestic manufacturers who focus on quality.

To address these challenges, the Government of India introduced regulatory measures by implementing mandatory Quality Control Orders (QCOs) on plywood and panel products, effective from February 2025. Under these orders, all plywood and panel imports entering India from March 2025 onwards must comply with Bureau of Indian Standards (BIS) certification requirements. Only consignments originating from manufacturers holding a valid BIS license are eligible for import, ensuring that products meet minimum quality and safety standards.

1.3 Objective and Scope of the Study

The primary objective of this study is to assess the effectiveness of the QCOs implemented in February 2025, particularly in determining whether they have succeeded in restricting imports from foreign manufacturers lacking valid BIS licenses. In addition, the study aims to identify specific aspects related to non-compliant imports, including the top source countries involved, the major Indian ports receiving such shipments, the product categories under which these consignments are entering and the foreign manufacturers associated with them.

The scope of this study is limited to three major categories of wood panel products — plywood, medium-density fibreboard (MDF) and particle board. The analysis covers month-wise import data from March 2025 to August 2025, representing the immediate post-QCO implementation period.

Sources: Trade Portal, Department of Commerce, Ministry of Commerce and Industry; BIS Licensee Database.

2. Analysis of Plywood Imports in the Post-QCOs Era

2.1 Monthly Trends in Plywood Imports to India

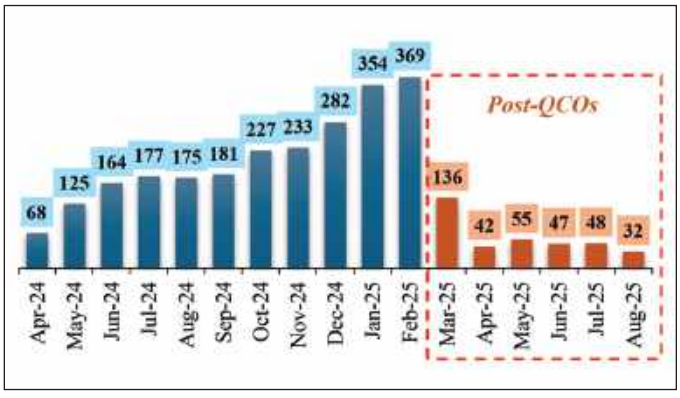

Figure 1: Monthly Trend of India's Plywood Imports (in ₹ crore).

During the last financial year, in the months leading up to the implementation of the QCOs, monthly imports of plywood (products classified under HSN Code 4412) were on a sharp upward trend. This surge was primarily driven by the large-scale dumping of sub-standard products, as mentioned earlier. The substantial import values recorded in January and February 2025 reflect aggressive stockpiling by importers ahead of the regulatory enforcement.

However, monthly import figures sharply declined following the implementation of the QCOs. Plywood imports dropped to ₹136 crore in March and continued to decline in the subsequent months — ₹42 crore in April, ₹55 crore in May, ₹47 crore in June, ₹48 crore in July and ₹32 crore in August 2025.

2.2 Major Source Countries for India's Plywood Imports in the Post-QCOs Era

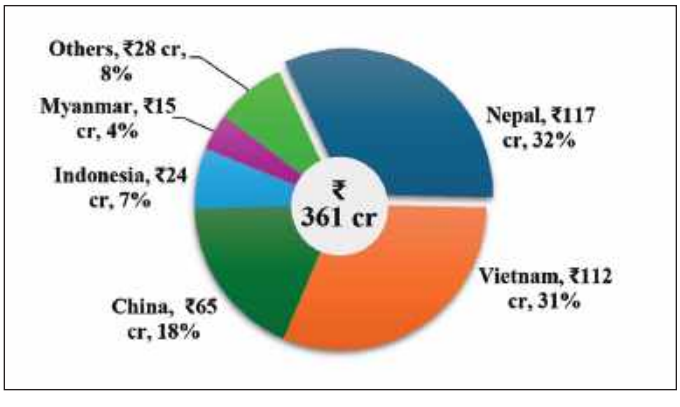

Figure 2: Source Country Share in India's Plywood Imports Post-QCOs (Mar-Aug 2025).

Following the implementation of the QCOs, India imported plywood products worth ₹361 crore between March and August 2025. Notably, nearly 81% of these post-QCO imports — valued at approximately ₹294 crore — originated from just three countries: Nepal, Vietnam and China.

Nepal emerged as the leading source, accounting for 32% of India's total plywood imports during this period. It was closely followed by Vietnam with a 31% share, while China held the third position with 18% of the total imports.

However, according to the BIS website, only nine plywood manufacturers — all based in Nepal — have been granted BIS licenses so far. This stark contrast raises serious questions about how consignments from countries other than Nepal continue to enter India despite the mandatory licensing requirements under the QCOs. What is more concerning is that Vietnam and China remain the top source countries for India's plywood imports in the post-QCO period, despite no manufacturer from either country having been issued a BIS license for any category of plywood.

Key Takeaway:

Despite no manufacturer from Vietnam or China being issued a BIS license for any category of plywood, both countries continue to remain top source countries for India's plywood imports in the post-QCO period — raising serious questions about the enforcement mechanisms of the QCOs.

2.2.1 Plywood Imports from Vietnam in the Post-QCOs Era

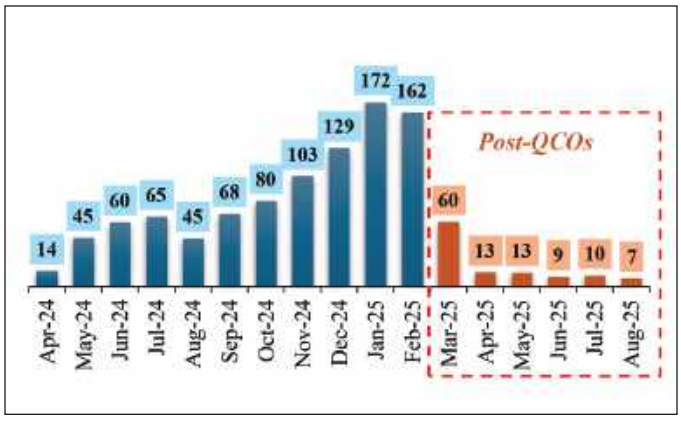

Figure 3: Monthly Trend of Plywood Imports from Vietnam (in ₹ crore).

The month-wise trend of plywood imports from Vietnam shows that imports substantially declined following the implementation of the QCOs. Plywood imports fell to ₹60 crore in March and further declined to ₹13 crore each in April and May, ₹9 crore in June, ₹10 crore in July and ₹7 crore in August 2025. However, all such imports that arrived in the post-QCOs period were non-BIS-compliant, as no plywood manufacturer from Vietnam has been issued a BIS license for any category of plywood.

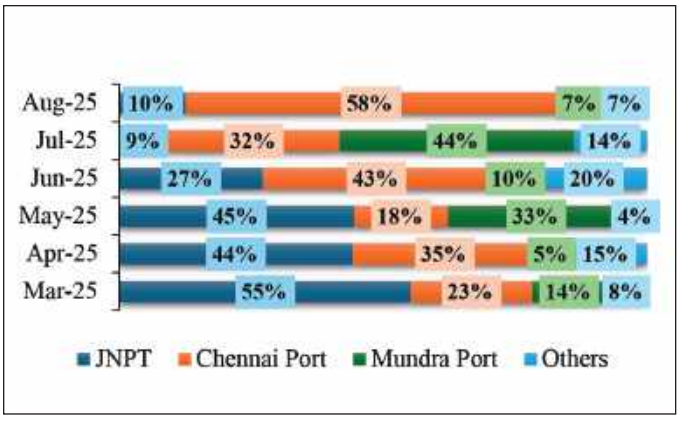

Figure 4: Arrival Port-wise Distribution of Plywood Imports from Vietnam Post-QCOs.

There have been significant month-wise shifts in the major Indian arrival ports for plywood imports from Vietnam during the post-QCOs period. In March 2025, Jawaharlal Nehru Port (Nhava Sheva) in Navi Mumbai was the largest entry point, accounting for nearly 55% of Vietnam's plywood shipments to India. However, by August 2025, Chennai Port had emerged as the leading entry point, handling approximately 58% of total plywood imports from Vietnam.

The product-wise distribution of plywood imports from Vietnam shows that a vast majority of these imports have consistently been classified under the 'Others' sub-category of HSN Code 4412 during the post-QCOs period. In August 2025, approximately 82% of plywood imports from Vietnam were classified under the 'Others' sub-category, primarily under HSN Codes 44123190, 44123490 and 44129990.

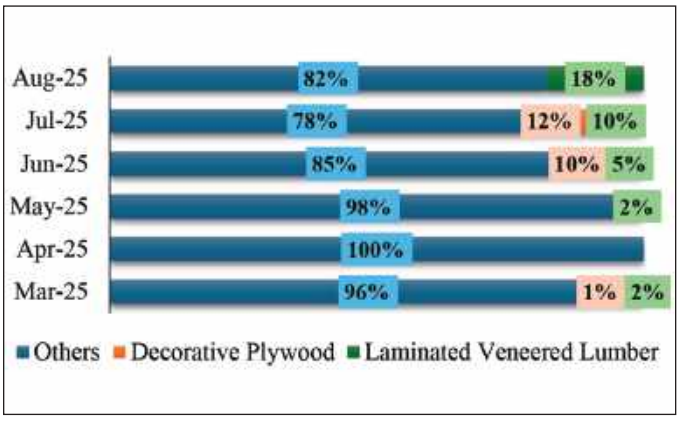

Figure 5: Product-wise Distribution of Plywood Imports from Vietnam Post-QCOs.

The following table lists Vietnam-based plywood manufacturers without BIS licenses whose consignments were cleared at Indian entry points in August 2025, despite the QCOs being in place.

Table 1: List of Vietnam-Based Plywood Manufacturers Without BIS Licenses Whose Consignments Were Cleared at Indian Entry Points in August 2025.

1. 368 Plywood Import Export Joint Stock Co.	2. Alphawood Vietnam Joint Stock Co.	3. An Lam	4. Bright Vina Plywood
5. Hung Dung Hth Production & Trading	6. Longdat Import Export & Production	7. TCQ	8. TT Plywood Import Export & Trading
9. Vinacamon Joint Stock Co.	10. Wood Alliance Production		

2.2.2 Plywood Imports from China in the Post-QCOs Era

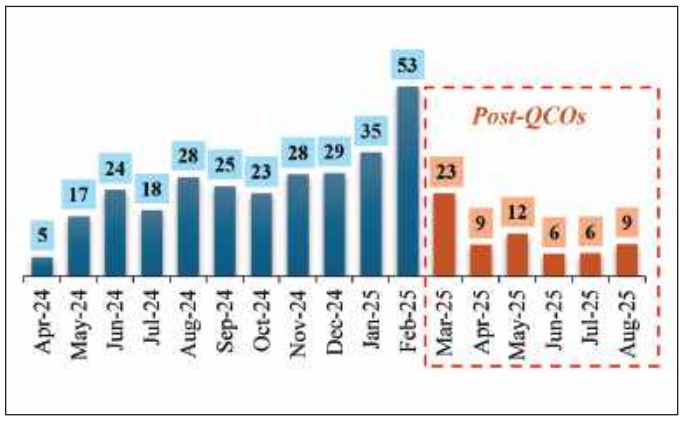

Figure 6: Monthly Trend of Plywood Imports from China (in ₹ crore).

Similar to the plywood imports from Vietnam, imports of plywood from China declined sharply following the implementation of the QCOs. Plywood imports from China fell to ₹23 crore in March 2025, further decreasing to ₹9 crore in April, ₹12 crore in May, ₹6 crore each in June and July and ₹9 crore in August 2025. Notably, all such imports from China during the post-QCOs period were non-BIS-compliant, as no plywood manufacturer from China has been granted a BIS license for any plywood category.

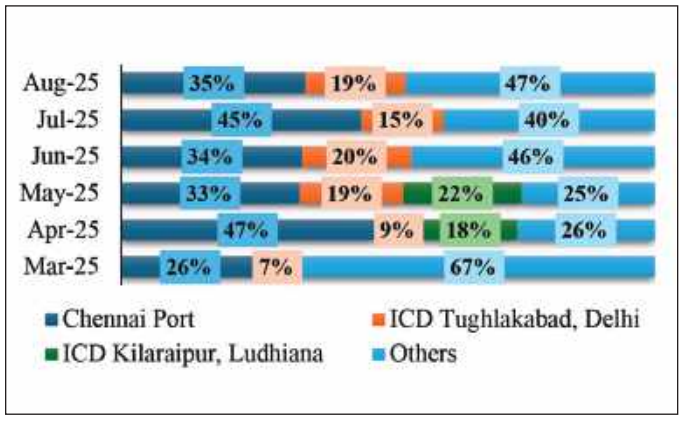

Figure 7: Arrival Port-wise Distribution of Plywood Imports from China Post-QCOs.

Furthermore, the arrival port-wise distribution of plywood imports from China during the post-QCOs period indicates that Chennai Port consistently remained the largest entry point for these imports. In August 2025, Chennai Port alone handled approximately 35% of plywood consignments arriving from China. It was followed by the Inland Container Depot (ICD) Tughlakabad in Delhi, which handled about 19% of the total plywood consignments from China during the same month.

Similar to the trends observed in Vietnam, the product-wise distribution of plywood imports from China during the post-QCOs period shows that a vast majority of these imports have consistently been classified under the 'Others' sub-category of HSN Code 4412. In August 2025, nearly 77% of plywood imports from China were classified under the 'Others' sub-category, primarily under HSN Codes 44123390, 44129990 and 44123990.

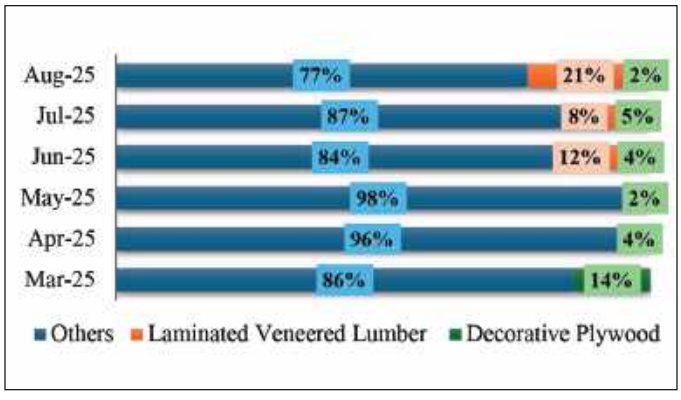

Figure 8: Product-wise Distribution of Plywood Imports from China Post-QCOs.

The following table lists China-based plywood manufacturers without BIS licenses whose consignments were cleared at Indian entry points in August 2025, despite the QCOs being in place.

Table 2: List of China-Based Plywood Manufacturers Without BIS Licenses Whose Consignments Were Cleared at Indian Entry Points in August 2025.

1. Accahome Ltd	2. Beijing Graphic International Trade	3. Fuzhou Hongland Model
4. Guangzhou Jiuyuekang Medical Equipment	5. Heze Ruidu International Trade	6. Hongkong Qichuang Wooden Products
7. Huzhou Jonhos Creative Home	8. Huzhou Shito Homie	9. Huzhou Teya Floor
10. Huzhou Weiya Trading Industry	11. Jinemen Dier Wooden	12. Jining Floormaker
13. Linyi Chunchang International Trade	14. Linyi Huanhai International Trade	15. Max Choice Wood Industry
16. Shandong Changsen Import & Export	17. Shandong King Kong Industry	18. Suqian Sulu Import & Export Trading
19. Xiang Ou Trade	20. Xuzhou Emmet Import & Export	21. Zhejiang Yi Yang International Trade

2.2.3 Plywood Imports from Nepal in the Post-QCOs Era

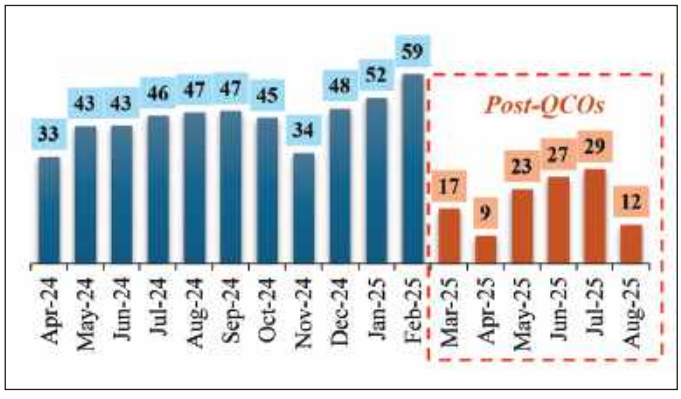

Figure 9: Monthly Trend of Plywood Imports from Nepal (in ₹ crore).

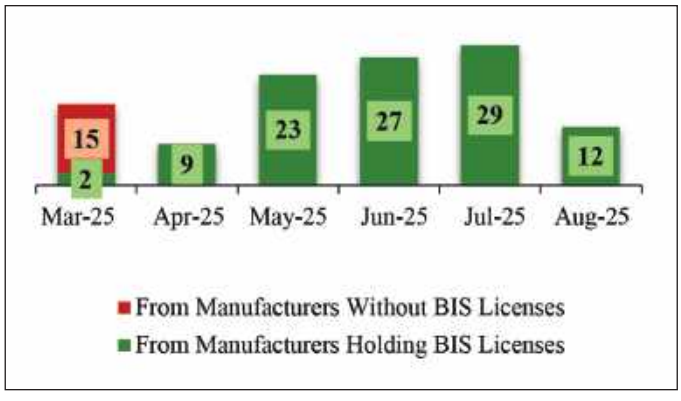

Figure 10: Legal vs Illegal Plywood Imports from Nepal Post-QCOs (in ₹ Crore).

Similar to the trends observed in plywood imports from Vietnam and China, monthly plywood imports from Nepal remained relatively low during the post-QCO period compared to the pre-QCO months. Imports declined to ₹17 crore in March 2025, further dropping to ₹9 crore in April before rising to ₹23 crore in May, ₹27 crore in June, ₹29 crore in July and then falling to ₹12 crore in August 2025.

Notably, in March 2025, despite the QCOs being in effect, approximately 88% of total plywood imports from

Nepal—amounting to nearly ₹15 crore—originated from 30 manufacturers lacking valid BIS licenses. However, from April 2025 onwards, all plywood imports from Nepal were sourced exclusively from manufacturers holding valid BIS licenses, indicating full BIS compliance during the subsequent months.

The following table lists Nepal-based plywood manufacturers who have been issued BIS licenses for plywood.

Table 3: List of Nepal-Based Plywood Manufacturers Holding BIS Licenses for Plywood.

1. Ambey Bhawani Ply Board Udhyog	2. Bhusal Ply & Bamboo Industries	3. Century Ply Industries
4. Everest Veneers	5. Ganpati Veneer Tatha Plywood Udhyog	6. Greenply Industries Nepal
7. Jhapa Veneer and Plywood Udhyog	8. Sawariya Plywood	9. Shyam Ply-wood Industries

During May, June and July 2025, compared with previous months, an abnormal surge was observed in plywood exports to India from the 9 Nepal-based companies holding BIS licenses. This pointed to a strong possibility that non-BIS-compliant plywood was entering India under the cover of certified material. However, in August 2025, a declining trend in plywood imports from Nepal (or from those 9 manufacturers holding BIS licenses) suggests that compliance mechanisms have started being enforced more strictly.

3. Analysis of Medium-Density Fibreboard (MDF) Imports in the Post-QCOs Era

3.1 Monthly Trends in Medium-Density Fibreboard (MDF) Imports to India

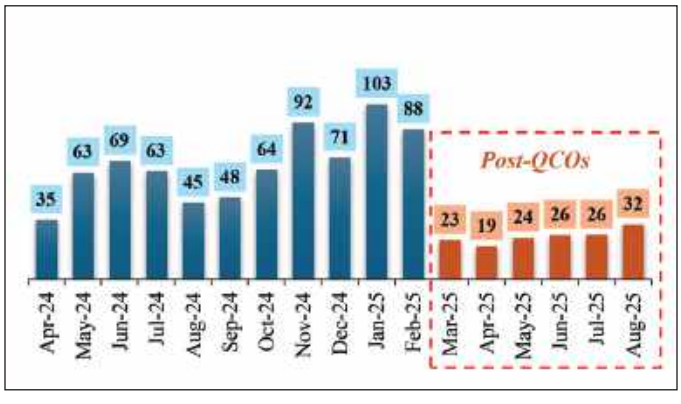

Figure 11: Monthly Trend of India's MDF Imports (in ₹ crore).

During the last financial year, in the months leading up to the implementation of the QCOs, monthly imports of medium-density fibreboard (MDF), classified under HSN Code 4411, remained at elevated levels. Import figures surged significantly to ₹103 crore in January and ₹88 crore in February 2025, driven primarily by substantial stockpiling by importers ahead of the QCO enforcement deadline.

However, similar to the trends observed in the plywood segment, monthly imports of MDF declined in the post-QCO period compared to pre-QCO levels. India imported MDF worth ₹23 crore in March, ₹19 crore in April, ₹24 crore in May, ₹26 crore in both June and July, and ₹32 crore in August 2025.

3.2 Major Source Countries for India's Medium-Density Fibreboard (MDF) Imports in the Post-QCOs Era

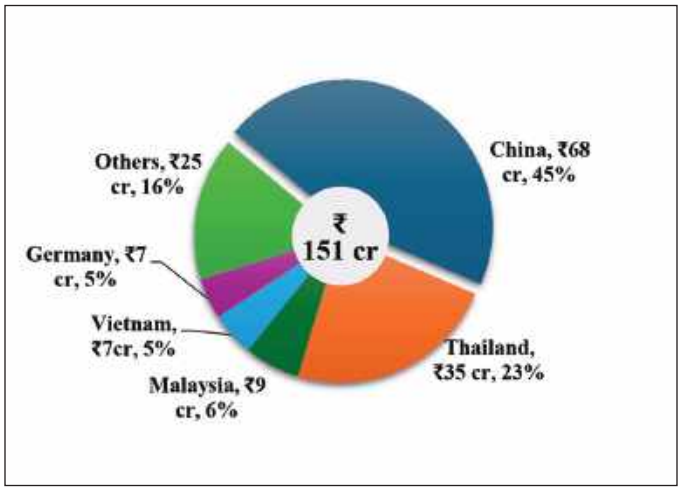

Figure 12: Source Country Share in India's MDF Imports Post-QCOs (Mar-Aug 2025).

In the post-QCO period between March and August 2025, India imported MDF worth ₹151 crore. Notably, nearly 69% of these imports originated from just two countries — China and Thailand. During this period, China emerged as the leading source, accounting for approximately 45% of total MDF imports, followed by Thailand with a 23% share.

However, according to the BIS website, only two manufacturers — one based in Thailand and another in Malaysia — have been granted BIS licenses for MDF so far. This stark contrast raises serious questions about how consignments from countries other than Thailand and Malaysia, particularly China, continue to enter India despite the mandatory QCOs being in place.

The following table lists foreign manufacturers that have been issued BIS licenses for MDF.

Table 4: List of Foreign Manufacturers Holding BIS Licenses for MDF.

1. Vanachai Panel Industries (Thailand)	2. Robin Resources (Malaysia)

Key Takeaway:

Despite no manufacturer from China being issued a BIS license for any category of MDF, China remains the top source country for India's MDF imports in the post-QCO period—raising serious concerns about the enforcement of the QCOs.

4. Analysis of Particle Board Imports in the Post-QCOs Era

4.1 Monthly Trends in Particle Board Imports to India

Similar to the trends observed in the plywood and MDF segments, imports of particle board (classified under HSN Code 4410) also followed a similar pattern. Compared to pre-QCO levels, monthly imports of particle board declined during the post-QCOs period. India imported particle board worth ₹6 crore in March, ₹4 crore in April, ₹6 crore in May, which then fell to ₹3 crore in both June and July, before rising slightly to ₹4 crore in August 2025.

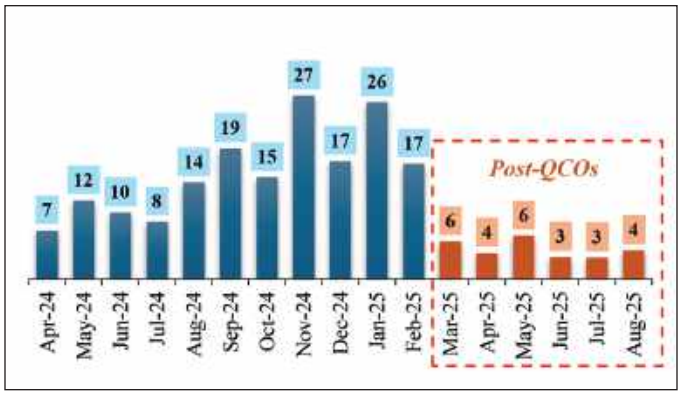

Figure 13: Monthly Trend of India's Particle Board Imports (in ₹ crore).

4.2 Major Source Countries for India's Particle Board Imports in the Post-QCOs Era

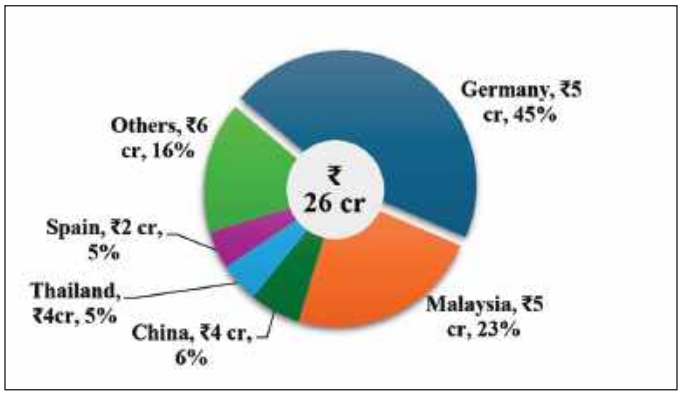

Figure 14: Source Country Share in India's Particle Board Imports Post-QCOs (Mar-Aug 2025).

In the post-QCOs period between March and August 2025, India's imports of particle board amounted to ₹26 crore. Notably, the top two source countries—Germany and Malaysia—accounted for a significant 69% share of India's total particle board imports during this period.

During this period, approximately 45% of total particle board imports originated from Germany, establishing it as the leading source country in the post-QCOs period, followed by Malaysia, which accounted for a 23% share. However, according to the BIS website, no foreign manufacturer has been granted a BIS license for any category of particle board to date. This implies that all particle board consignments entering India during the post-QCO period were non-BIS-compliant. This stark discrepancy raises serious questions about how particle board consignments worth ₹26 crore entered India between March and August 2025, despite the absence of valid BIS licenses for any foreign manufacturers in this category.

Key Takeaway:

Despite no foreign manufacturer being issued a BIS license for any category of particle board, India imported particle board worth ₹26 crore during the post-QCO period (March–August 2025), raising serious concerns about the effectiveness of QCO enforcement mechanisms.

5. Conclusion

This study reveals mixed results regarding the effectiveness of the QCOs in restricting imports from foreign manufacturers lacking valid BIS licenses. While import levels across all three segments—plywood, medium-density fibreboard (MDF) and particle board—have declined in the post-QCOs era compared to the pre-QCOs period, a deeper analysis uncovers significant discrepancies.

In both the plywood and MDF segments, a substantial portion of imports arriving in India after the QCOs enforcement in February originated from foreign manufacturers without valid BIS licenses, rendering these consignments non-BIS-compliant. The particle board segment presents even more concerning findings: with no foreign manufacturer issued a BIS license to date, all particle board imports post-QCOs implementation have been non-compliant.

These findings indicate that, although some progress has been made in curbing the entry of substandard plywood and panel products into the Indian market, the QCOs are far from fully effective. To ensure the QCOs achieve their intended objectives, it is imperative to strengthen enforcement mechanisms and address existing loopholes that continue to permit non-compliant imports.❑

FIPPI's Appeal for GST Rationalization: Representations Submitted to Hon'ble Union Ministers

As part of its continued advocacy efforts, the Federation of Indian Plywood and Panel Industry (FIPPI) has submitted formal representations to the Hon'ble Union Ministers of Finance, Agriculture & Farmers Welfare and Environment, Forest & Climate Change. The core appeal: a reduction in the Goods and Services Tax (GST) from 18% to 5% on agroforestry-sourced timber and plywood & panel products manufactured from such farm-grown wood.

Through its representation, FIPPI has emphasized that this rationalization of GST rates would promote and incentivize the use of renewable and eco-friendly materials over synthetic alternatives like PVC and acrylic panels, which are also taxed at 18%. Additionally, the proposed move would support agroforestry adoption at scale among farmers, boost rural incomes, reduce import dependency, promote carbon sequestration and help formalize the highly fragmented Indian plywood and panel industry. It also aligns with key national priorities such as Make in India, Atmanirbhar Bharat and the goal of Doubling Farmers' Incomes.

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

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Phone No.: +91-11-2575 5649 • **E-mail:** fippi@fippi.org • **Website:** www.fippi.org

Chief Patron	Patrons	President	Senior Vice President	Vice Presidents	Director General
Mr. Sajjan Bhajanka	Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	Mr. Rajesh Mittal	Mr. Jaydeep Chitlangia	Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Dr. M.P. Singh

FIPPI/GST2/2025-26 August 25, 2025

To

Smt. Nirmala Sitharaman
Hon'ble Finance Minister of India
Ministry of Finance, Government of India North Block,
New Delhi

Shri Shivraj Singh Chouhan
Hon'ble Minister of Agriculture & Farmers Welfare
Ministry of Agriculture & Farmers Welfare, Government of India

Shri Bhupender Yadav
Hon'ble Minister of Environment, Forest and Climate Change
Ministry of Environment, Forest and Climate change, Government of India

Subject: Representation for Reduction of Goods and Services Tax (GST) on Agroforestry-Sourced Wood and Plywood & Panel Products Manufactured from Farm-Grown Timber.

Respected Madam,

This representation is made on behalf of the Federation of Indian Plywood and Panel Industry (FIPPI), the leading organization representing manufacturers of plywood, medium-density fiberboard, and particle board throughout India. FIPPI is dedicated to promoting the interests of the wood-based manufacturing sector and acts as a principal advocate for the industry in policy and regulatory discussions. In this capacity, we wish to present this representation requesting the rationalization and reduction of the Goods and Services Tax on agroforestry and farm-grown timber, as well as on plywood and panel products produced from these sustainable sources.

1.0 Importance of Agroforestry and Farm Grown Timber in the Indian Economy

1.1 The Indian plywood and panel sector plays a vital role in the national economy, underpinning numerous allied industries such as furniture manufacturing, construction, interior design, and real estate. This sector is uniquely positioned to promote rural development and environmental sustainability due to its heavy reliance on agroforestry and farm-grown timber as primary raw materials. However, despite being a tropical country, India has not been able to unlock the full potential of agroforestry. The following key economic benefits highlight the sector's contribution:

- **Employment Generation and Rural Development:** The plywood and panel industry is a significant employer, especially in rural areas where many farm-grown timber processing units are situated. By providing livelihoods to millions, the sector bolsters local economies and helps curb urban migration by creating meaningful job opportunities in rural regions. Expanding this industry can further enhance employment, spur economic growth, and contribute to achieving targeted GDP growth rates. Additionally, the sector's expansion has a multiplier effect by stimulating ancillary industries and strengthening the broader rural and semi-urban economic ecosystem. Agroforestry is critical to transforming the livelihood of the farmers in many ways. Agroforestry and trees outside forests provide 65 per cent of small timber and 70 - 80 per cent of wood for the furniture and construction industries (CAFRI - ICAR 2015). India is the fourth largest consumer of furniture in the world (Danish 2023) with a rising population and a promising growth rate its domestic demand from wood-based industries, like construction, pulp and paper, furniture, and plywood, are all forecasted to grow from 57 million cubic meters to 97.8 million cubic meters (by 70 per cent) between 2020 and 2030 (Nautiyal 2021).
- **Support to Furniture and Interior Design Industries:** India is rapidly emerging as a global hub for the furniture market, driven by rising disposable incomes and shifting consumer preferences. Plywood and panel products serve as essential raw materials for manufacturing high-quality furniture. Growing demand for customized, durable, and visually appealing furniture continues to boost plywood and panel consumption, increasing both domestic sales and export potential. Wood- based industries like furniture are expected to grow both domestically and globally at a CAGR of 10.9 (Danish 2023) and 8.6 per cent (Skyquest 2024), respectively. Therefore, replacing teak imports by scaling up domestic production through agroforestry provides not only a low-cost opportunity to reduce imports worth USD 350 million per year (2021-2022 total imports of Teak; EXIM Bank 2023) but, more importantly, create new economic opportunities for farmers, artisans and manufacturers by making India a leader in the global teak market. This growth not only enhances foreign exchange inflows but also strengthens India's position in the global marketplace, positively contributing to the country's GDP.
- **Promotion of the 'Made in India' Initiative:** Today, India has become a net importer of timber. In 2023, India imported over USD 2.7 billion worth of timber (ITTO 2023), which equals almost 12 per cent of all agro-based imports for the same year (Damodaran 2024). Between 2010 and 2019, 42 per cent of total timber imports came from "at-risk countries", while 80 per cent of teak and more than 70 per cent of Gurjan (high-value native species) came from high-risk countries or conflict-affected states (Canby 2020) Encouraging domestic production of plywood and panel products is central to the 'Made in India' campaign. By reducing import dependence and fostering local manufacturing, India can conserve foreign exchange reserves, generate employment, and stimulate related industries. This aligns with government goals of achieving a 7% GDP growth rate and helps ensure inclusive economic benefits across the population.
- **Steady Year-Round Income for Farmers:** Agroforestry-based diversified cropping enables farm enterprises to operate continuously throughout the year, avoiding the cyclical nature of seasonal demands. This approach provides farmers with a sustainable, year-round source of income, promoting financial stability and resilience in rural communities.

1.2 The Indian plywood and panel sector currently consists of approximately 3,300 units across small, medium, and large enterprises, with an organized-to-unorganized ratio of 20:80. Together, these units provide employment to around 3.5 million individuals nationwide. The market size of the Indian plywood and panel industry was estimated at roughly INR 27,000 crore for the fiscal year 2022-23, demonstrating a strong compound annual growth rate (CAGR) of 14.2% between 2018 and 2023 (Source: Annual Survey of Industries).

1.3 The introduction of mandatory Quality Control Orders (QCOs) for plywood and panel products, effective from

February 2025, is set to drive the production of high-quality, standardized products. These regulations are anticipated to decrease reliance on imports, enhance domestic manufacturing, create additional employment opportunities, and stimulate demand for agroforestry-based raw materials—thereby contributing to the expansion of green cover. Moreover, the QCOs support critical national initiatives such as Make in India and Atmanirbhar Bharat, further strengthening the sector's strategic importance.

2.0 The Federation of India Plywood and Panel Industry (FIPPI) respectfully submits this formal representation seeking a reduction in GST (from 18% to 5%) on agroforestry-sourced wood and plywood and panel products made from such farm grown timber, on the following grounds:

2.1 Recognizing Agroforestry-Sourced Wood as Farm-Based Produce

Approximately 92% of the timber utilized by the Indian plywood and panel industry is derived from Trees Outside Forests (ToF) or agroforestry sources. India's agroforestry plantations are spread across 28 million hectares (Raza H Rizvi 2022) of land, occupying approximately 8 per cent of India's geographical land area, and play a crucial role in the economy. This supply chain directly supports over one million farmers, providing them with sustainable livelihoods and making a vital contribution to rural economies. Since these raw materials are cultivated on farmlands, they should be regarded as equivalent to other farm produce. Despite their agricultural origin, agroforestry-sourced wood is currently subject to an 18% GST rate, which is substantially higher than that levied on agricultural products. While unprocessed farm produce is exempt from GST and processed or packaged food products benefit from a concessional 5% rate, agroforestry timber does not receive similar tax benefits. This discrepancy in tax treatment disincentivizes farmers from participating in agroforestry and limits the sector's potential benefits. Addressing this inequity by classifying agroforestry-sourced wood on par with other farm produce within the GST framework will encourage greater farmer involvement, increase rural incomes, and advance the government's objectives for rural development.

2.2 Encouraging Sustainable Materials Through GST Revision on Wood Panels

The Government of India has shown a clear commitment to promoting sustainable and eco-friendly products by applying lower GST rates in various sectors. For instance:

i. Natural fibers in textiles are taxed at 0-5% GST, while man-made fibers attract an 18% rate.

ii. Electric vehicles are subject to a 5% GST, compared to 28% for internal combustion engine vehicles.

In contrast, wood panels—a highly sustainable material—are taxed at 18%, the same rate as non- sustainable alternatives such as acrylic panels, PVC panels, and wood-plastic composites, which are predominantly synthetic. Unlike these non-sustainable substitutes, wood production through plantations actively contributes to oxygen generation and carbon sequestration. Furthermore, wood processing requires significantly less energy, resulting in lower greenhouse gas emissions. Wood products also store carbon throughout their lifespan and reuse, releasing it only upon decomposition or burning, thereby helping to mitigate climate change. Reducing the GST on wood panels would promote the adoption of sustainable materials, supporting the alignment of tax policy with India's environmental goals and climate commitments.

2.3 Encouraging Formalization and Enhancing Tax Compliance in the Sector

The sector's large unorganized segment, which accounts for 80% of the market, is highly sensitive to pricing. The current high GST rate acts as a barrier to voluntary tax compliance among these small-scale operators. Reducing the GST on agroforestry-sourced wood and plywood & panel products to 5% could motivate many of these unorganized units to enter the formal tax system, thereby enhancing overall compliance. Greater compliance would encourage more small players to legally register and fulfill their tax obligations, helping to curb tax evasion and boost government revenue. Additionally, lowering the tax rate would narrow the price discrepancy between standard and sub-standard products, fostering a more level playing field within the industry. Ultimately, this reduction would support the government by increasing both direct and indirect tax collections while promoting formalization and fairness across the sector.

2.4 Enhancing Farmer Incomes and Promoting Rural Development

Agroforestry plays a crucial role in increasing the incomes of small and marginal farmers by providing an additional

revenue source without compromising food crop production. The entire agroforestry value chain—including planting, maintenance, harvesting, and transportation—generates significant employment opportunities in rural areas. However, the current high GST rate reduces the appeal of agroforestry for these communities. Implementing a concessional GST rate would offer several benefits:

- Increased Farmer Engagement: Lowering the tax burden on agroforestry-sourced wood and plywood & panel products would encourage more farmers to adopt agroforestry, expanding the sector's reach and positive impact.
- Income Stability: Providing steady and diversified income streams would enhance the financial resilience of rural households.
- Support for National Development Goals: Reducing GST in this sector aligns with broader policy objectives such as doubling farmer incomes, environmental amelioration through enhanced carbon sequestration and soil health improvement, advancing the 'Atmanirbhar Bharat' initiative, and promoting affordable housing by lowering the cost of wood-based construction materials.

Reducing the GST on agroforestry-sourced wood and wood panels manufactured from these materials would advance the Government's affordable housing objectives, increase farmer incomes by promoting agroforestry, and strengthen tax compliance by diminishing incentives for evasion. Over time, greater formalization and rising demand are expected to enhance overall government tax revenues.

We trust that this representation will be given due consideration to advance agroforestry, encourage the formalization of the plywood and panel industry, and contribute to climate change mitigation efforts.

Thanking You,

Rajesh Mittal
President
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

FIPPI Advocates for the Introduction of Reverse Charge Mechanism (RCM) on Purchase of Timber from Agroforestry under GST

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

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FIPPI/GST2/2025-26 August 20, 2025

To,

Shri Arvind Shrivastava IAS
Secretary
Department of Revenue, Ministry of Finance,
New Delhi

Kind Attention:
Shri Pankaj Kumar Singh
Additional Secretary
Goods and Services Tax Council Secretariat
Department of Revenue, Ministry of Finance,
New Delhi

Subject: Representation for introduction of Reverse Charge Mechanism (RCM) on purchase of Wood from Agroforestry under GST.

On behalf of the Federation of Indian Plywood & Panel Industry (FIPPI), we, the undersigned, respectfully submit this representation to the esteemed GST Council, requesting your kind consideration for the implementation of the Reverse Charge Mechanism (RCM) on the purchase of timber under the Goods and Services Tax (GST) framework.

1.0 Background and Current GST Position

1.1 The Federation of Indian Plywood & Panel Industry (FIPPI) serves as the apex representative body for the plywood and wood-based industries in India. Renowned for promoting innovation, collaboration, and sustainability, FIPPI plays a pivotal role in shaping the future of this vital sector. As India pursues robust economic growth with an ambitious target of 7% GDP expansion, key sectors such as manufacturing, infrastructure, and construction remain central to this progress. Within this landscape, the plywood and timber industry has established itself as a significant contributor, providing both direct and indirect support to the nation's economic development.

1.2 Wood from Agroforestry serves as essential raw material for multiple Wood Based Industries such as plywood, Blockboard, MDF, Particle Boards, Wooden Flush doors, furniture, paper, and packaging. In India, the wood supply chain is highly fragmented, with a large share of transactions carried out by unregistered individual farmers, small traders, and part time contractor/gatherers, most of whom operate outside the formal tax system. This fragmentation has resulted in challenges related to tax compliance, revenue leakage, and difficulties for registered buyers in claiming input tax credit.

1.3 Currently, the supply of wood is subject to GST at the applicable rate, typically 18% for most timber products,

with the compliance responsibility resting mainly on the supplier. However, when the supplier is non-compliant or unregistered, the registered recipient is unable to avail input tax credit, resulting in tax cascading and higher overall costs.

1.4 Under the current Goods and Services Tax (GST) framework, the obligation to collect and remit tax to the government typically rests with the supplier. However, a large portion of wood trade is carried out by unregistered individual farmers, small traders, and part time contractors/gatherers. Furthermore, even among registered traders, there is widespread non-compliance with GST provisions. As a result, industries face significant challenges in claiming input tax credit (ITC), as their ITC claims are frequently disputed by the tax authorities due to supplier non- compliance.

- **Unorganized Supply Chain:** A significant number of wood suppliers remain unregistered and/or non-compliant, making it challenging for registered buyers to ensure compliance and claim input tax credit.
- **Revenue Leakage:** The lack of an effective mechanism to tax supplies from unregistered people and to collect tax from non-compliant suppliers results in potential revenue loss for the government.
- **Compliance Challenges:** Registered buyers struggle to verify the GST status of their suppliers and maintain accurate documentation for input tax credit, often leading to unnecessary disputes and litigation from tax authorities.
- **Established Precedents:** The GST framework already incorporates the Reverse Charge Mechanism (RCM) in sectors with similar characteristics, such as the procurement of agricultural produce from unregistered farmers and goods like cashew nuts and bidi leaves.

1.5 Under Sections 9(3) and 9(4) of the Central Goods and Services Tax Act, 2017, the Government holds the authority to notify specific categories of goods for which the recipient is required to pay tax under the Reverse Charge Mechanism (RCM). Implementing RCM in these cases acts as an effective measure to integrate unorganized sectors into the GST framework, thereby enhancing transparency and accountability.

2.0 Recommendation for introduction of RCM on Wood Purchases for discharging GST

2.1 In light of the above, we respectfully propose that the GST Council consider notifying the purchase of wood from agroforestry under Sections 9(3) or 9(4) of the CGST Act, 2017, as a supply taxable under the Reverse Charge Mechanism. The implications of this recommendation are as follows:

- Registered recipients of wood from agroforestry would be responsible for paying GST on wood purchases under the Reverse Charge Mechanism, thereby reducing reliance on tax compliance by suppliers operating as unorganized entities in the market.
- Recipients would be eligible to claim input tax credit on the tax paid under reverse charge, subject to adherence to other provisions of the GST law.
- This measure would enhance transparency, strengthen tax compliance, and promote a level playing field for all participants in the industry.

2.2 Introduction to the Reverse Charge Mechanism on Wood Purchases and Its Benefits:

(a) Expanding the Tax Base: By bringing timber purchases under the Reverse Charge Mechanism (RCM), the responsibility for GST payment shifts to the registered recipient. This ensures that all taxable supplies, including those sourced from the unorganized sector, are effectively captured within the GST framework.

(b) Preventing Revenue Leakage: One of the core objectives of the GST regime is to achieve comprehensive tax coverage across all sectors and transactions. The wood sector, particularly at the procurement level, involves numerous unorganized suppliers such as small-scale contractors/ gatherers, local farmers, and informal mandi traders. When registered buyers purchase wood from agroforestry from these unregistered or unorganized suppliers, these transactions often evade GST compliance, leading to direct revenue losses for the government and weakening the GST system's effectiveness.

Introducing RCM on wood purchases shifts the tax payment responsibility to the registered buyer, there by ensuring that all taxable wood/timber supplies— regardless of the supplier's registration status—come under GST coverage. This mechanism helps close existing gaps, curbs revenue leakages, boosts tax collections, and

ensures the timber sector contributes fairly to government revenues.

(c) Ensuring Smooth Input Tax Credit Flow: A fundamental advantage of the GST system is the seamless availability of input tax credit (ITC) throughout the supply chain, designed to prevent tax cascading and lower the overall tax burden on businesses. However, when registered buyers procure wood from unregistered or non-compliant suppliers, they are unable to claim ITC on those purchases, resulting in increased procurement costs and disruptions in the credit chain. These inefficiencies ultimately raise prices for end consumers. The RCM fixes this challenge by requiring registered recipients to pay GST directly on wood purchases. Once tax is discharged under RCM, recipients can claim ITC on the tax paid, restoring the integrity of the credit mechanism. This not only lowers the effective tax burden on buyers but also fosters enhanced compliance and transparency within the sector.

(d) Promoting Transparency and Traceability: The wood-based industry is prone to unaccounted transactions, illegal logging, and tax evasion, posing significant challenges to both tax enforcement and environmental regulation. Implementing RCM can significantly improve transparency and traceability in wood/timber trade. Under RCM, registered buyers must maintain proper documentation, issue self-invoices for purchases from unregistered suppliers, and report such transactions in their GST returns. This increased documentation and reporting requirement facilitates better monitoring of wood from agroforestry and regulation of other timber movement, making it harder for illicit or unreported activities to escape detection. Enhanced traceability not only strengthens tax administration but also supports broader environmental goals such as sustainable forest management and conservation.

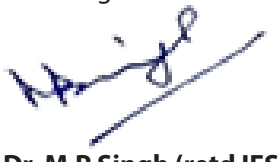
3.0 Suggested Implementation

3.1 The Council may consider issuing a notification under Sections 9(3) or 9(4) of the CGST Act, 2017, designating timber as a good subject to Reverse Charge Mechanism (RCM) when purchased from either registered or unregistered suppliers. Sufficient awareness campaigns and a reasonable transition period should be provided to the industry to facilitate smooth adjustment to the new compliance obligations.

We are confident that the GST Council will recognize the merits of this representation and take appropriate measures to implement the Reverse Charge Mechanism (RCM) on Wood from Agroforestry purchases. Such a step will not only improve tax compliance and revenue collection but also contribute to the growth and formalization of the Wood Based industry.

We remain available to provide any additional information or clarifications you may require.

Thanking You Yours faithfully,



Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

Together in Action: Unified Advocacy by the Entire Indian Plywood & Panel Industry for Inclusion of Agroforestry-Sourced Timber and Plywood & Panel Products in the 5% GST Slab

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

1005, VIKRANT TOWER, 4, RAJENDRA PLACE, NEW DELHI110 008, INDIA
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Chief Patron	Patrons	President	Senior Vice President	Vice Presidents	Director General
Mr. Sajjan Bhajanka	Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	Mr. Rajesh Mittal	Mr. Jaydeep Chitlangia	Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Dr. M.P. Singh

FIPPI/GST7/2025-26 August 30, 2025

To,

Shri Arvind Shrivastava
Secretary
Department of Revenue, Ministry of Finance,
New Delhi

Kind Attention:
Shri Pankaj Kumar Singh
Additional Secretary
Goods and Services Tax Council Secretariat,
Department of Revenue, Ministry of Finance
New Delhi

Subject: Unified Voice of the Plywood & Panel Industry in Support of Rationalization and Reduction of GST on Agroforestry-Sourced Timber and Plywood & Panel Products Manufactured from Farm-Grown Timber.

Respected Sir,

The Federation of Indian Plywood and Panel Industry (FIPPI), the apex body representing manufacturers and associations of plywood, medium-density fibreboard (MDF) and particle board across India serves as a primary voice for the sector in policy and regulatory matters. FIPPI wishes to bring to your esteemed attention that the entire Indian Plywood and Panel Industry is unified in its support for the rationalization and reduction of the Goods and Services Tax (GST) on agroforestry-sourced timber, as well as on plywood and panel products produced from these sustainable sources.

In this regard, various regional associations representing plywood and panel manufacturers, traders and allied bodies have formally submitted letters to the Hon'ble Union Finance Minister, the Goods and Services Tax (GST) Council as well as the respective Chief Ministers and Finance Ministers of their States, advocating for the reduction of GST. Kindly find enclosed the representations submitted by these regional associations. **(Annexure 1)**.

FIPPI further wishes to highlight that approximately 80% of the Indian Plywood and Panel Industry comprises small and unorganized players, whose operations are highly sensitive to pricing. The current high GST rate acts as a significant barrier to voluntary tax compliance among these smaller firms. A reduction of GST on agroforestry-sourced timber and plywood & panel products to 5% would incentivize these unorganized units to enter the formal tax system, thereby enhancing overall compliance.

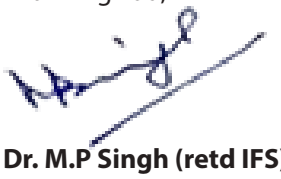
Moreover, with the recent enforcement of the Quality Control Orders (QCOs) on plywood and products effective from February 2025, even small, unorganized players will be required to engage in the production of high-quality, standardized products. The implementation of the QCOs will further drive formalization within the industry.

FIPPI is confident that the reduction in the GST rate from current rate of 18% to 5% on agroforestry-sourced timber and plywood & panel products will accelerate the formalization of the industry – thereby strengthening tax compliance and enhancing GST collections from the sector, surpassing the current tax revenue generated from the Indian Plywood and Panel Industry.

Additionally, this reduction would support the Government's affordable housing objectives, increase farmer incomes by promoting agroforestry and contribute to climate change mitigation by encouraging sustainable practices.

We respectfully request your kind attention and consideration in this regard. We remain confident that the proposed reduction of GST rate will lead to positive outcomes for the industry, the government and the nation at the large.

Thanking You,



Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

Annexure 1

List of Regional Associations That Submitted Letters Advocating GST Reduction to the Union Finance Minister, GST Council and Respective State Governments

S. No.	Name of Regional Association
1.	All Bharat Plywood & Laminates Trade Association (ABPLTA)
2.	All India Plywood Manufacturer's Association
3.	Association of Indian Plywood Panels & Laminate Industries
4.	Delhi-NCR Plywood Manufacturer Association
5.	Gujarat Plywood & Veneers Manufacturers Association
6.	Haryana Plywood Manufacturers' Association
7.	Plywood Manufacturer Welfare Association (Patna, Bihar)
8.	Plywood Manufacturers Welfare Association, U.P.
9.	Punjab Plywood Manufacturers Association
10.	Rajasthan Plywood Manufacturers Association
11.	The South Indian Plywood Manufacturers Association (SIPMA)
12.	UK UP Plywood Manufacturers Association.
13.	Wood Technologist Association (WTA).❑

Safeguarding Quality: FIPPI Requests Investigation into Continued Non-BIS-Compliant Imports from Vietnam and China Despite QCO Enforcement

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

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FIPPI/18C-2025 September 4, 2025

To,

Shri Rajesh Agrawal
Special Secretary,
Department of Commerce Ministry of Commerce and Industry,
Vanijya Bhawan, New Delhi.

Subject: Urgent Request for Investigation into Continued Non-BIS-Compliant Plywood Imports from Vietnam and China Despite Enforcement of the Quality Control Orders (QCOs).

Respected Sir,

The Government of India has enforced mandatory Quality Control Orders (QCOs) on plywood and panel products, effective from February 2025. As per the QCOs, only those products – whether domestically produced or imported – that are compliant with BIS certification requirements are permitted to enter the Indian market. Consequently, only foreign manufacturers holding a valid Bureau of Indian Standards (BIS) license are permitted to export plywood and panel products to India.

The Federation of Indian Plywood and Panel Industry (FIPPI) acknowledges that, compared to pre-QCO trends, imports of plywood products have declined substantially in the post-QCO period. However, a deeper analysis indicates that a significant majority – approximately 69% – of plywood imports that arrived in India during the post-QCO period (March to July 2025) originated from foreign manufacturers lacking BIS licenses. Kindly find enclosed a copy of our detailed trade analysis report on plywood imports during the post-QCO period, with special reference to Vietnam and China. (Annexure 1).

FIPPI would like to highlight the following critical findings related to this issue:

a. Import data reveals that approximately 81% of India's plywood imports (valued at around INR 273 crore) during the post-QCO period originated from just three countries – Vietnam, Nepal and China. However, no manufacturer from Vietnam or China has been issued a BIS license for any category of plywood so far, which implies that all imports from these countries during the post-QCO period are non-BIS-compliant.

b. A vast majority of plywood imports from Vietnam in the post-QCO period have been classified under the 'Others' sub-category of HSN Code 4412 – primarily under HSN Codes 44123190, 44129990 and 44123490. In July 2025, Mundra Port in Gujarat was the largest entry point for plywood imports from Vietnam, accounting for 44% of the total, followed by Chennai Port (32%) and Jawaharlal Nehru Port, Navi Mumbai (9%).

c. Similarly, plywood imports from China in the post-QCO period have been largely classified under the 'Others' sub-category of HSN Code 4412 – primarily under HSN Codes 44129990, 44123390 and 44123990. Chennai Port consistently remained the largest entry point for these imports in the post- QCO period.

FIPPI has already written to the relevant government authorities, seeking urgent investigation and regulatory action against such non-BIS-compliant imports from Vietnam and China, despite the enforcement of the QCOs. However, no concrete action appears to have been taken in this matter so far. Kindly find enclosed copies of two letters, previously submitted by FIPPI to the concerned authorities. (Annexure 2 & 3)

We respectfully request your support in initiating urgent investigation and appropriate regulatory action regarding the continued entry of non-BIS-compliant plywood imports from Vietnam and China, in violation of the mandatory QCOs.

Thanking You,

Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

Copy to:

1. Shri Sanjay Kumar Agarwal
   Chairman,
   Central Board of Indirect Taxes and Customs (CBIC)
   Department of Revenue, Ministry of Finance,
   North Block, New Delhi

2. Shri Pramod Kumar Tiwari
   Director General,
   Bureau of Indian Standards (BIS)
   Manak Bhawan, New Delhi

3. Shri Sanjiv
   Joint Secretary,
   Department for Promotion of Industry and Internal Trade (DPIIT)
   Vanijya Bhawan, New Delhi

FIPPI Advocates for Inclusion of All Products Under Chapter 44 and Wooden Furniture Under the 5% GST Slab on the Grounds of Sustainability

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FIPPI/GST8/2025-26 September 26, 2025

To,

Shri Tanmay Kumar IAS
Secretary
Ministry of Environment, Forest and Climate Change,
Indira Paryavaran Bhawan,
New Delhi

Subject: Representation for Inclusion of All Products under Chapter 44 and Wooden Furniture (HSN Code 9403) under the 5% GST Slab on account of their 'sustainability credentials'.

Reference: Letter No. FIPPI/GST4/2025-26 dated 30th August 2025.

Respected Sir,

On behalf of the Indian Plywood and Panel Industry, we sincerely commend the Government of India, under the leadership of Hon'ble Prime Minister Shri Narendra Modi, for progressive GST reforms aimed at enhancing national welfare. We appreciate the GST Council's rationalization recommendations from the 56th meeting held on 3rd September 2025, which focuses on benefiting common citizens, labour-intensive sectors, farmers, agriculture, and other economic drivers.

Referring to our earlier submission (Ref. No. FIPPI/GST4/2025-26 dated 30th August 2025), we reiterate our united appeal for rationalization and reduction of GST rates on agroforestry-sourced timber and plywood and panel products manufactured from these sustainable materials. The Federation of Indian Plywood and Panel Industry (FIPPI), along with regional associations of manufacturers and traders, has consistently advocated for wood-based materials to be classified distinctly from synthetic or metal alternatives. Wood is the most sustainable building material, outperforming acrylic or PVC panels and iron or aluminium doors in sustainability credentials. This distinction must be reflected in the policy framework, including GST categorization.

1.0 Wood: Benchmark of Sustainability in Construction and Furnishing

Among building materials, wood stands unparalleled in sustainability. Timber is renewable, climate- positive, biodegradable, carbon-sequestering, and requires significantly less energy for production than alternatives like steel, Aluminium, PVC, glass, cement, and polymers. While these alternatives rely heavily on non-renewable resources and involve pollutive, energy-intensive processes, timber— especially sourced through agroforestry—promotes afforestation, carbon capture, and sustains rural livelihoods.

1.1 Climate Mitigation Benefits of Wood

Timber's production and use offer substantial environmental benefits, including low embodied energy (8.5 MJ/kg

compared to 24.4 MJ/kg for steel) and minimal greenhouse gas emissions (0.7 kg CO_2e/kg). Trees absorb carbon dioxide during growth, storing it long-term within wood products and recycled forms. Promoting wood use is a direct, effective climate change mitigation strategy.

1.2 Advancing India's Climate Goals and Mission LiFE

Promoting sustainably sourced wood aligns with India's Nationally Determined Contributions (NDCs) under the Paris Agreement and Mission LiFE. Timber supports a carbon sink target of 2.5-3 billion tonnes CO_2 equivalent by 2030 through expanded forest cover. The Indian Plywood and Panel Industry sources approximately 92% of raw material from agroforestry plantations, thereby encouraging carbon sequestration, biodiversity, and rural economic stability.

2.0 Socioeconomic and Environmental Advantages

2.1 Farmer-Friendly Agroforestry Sourcing

Agroforestry-based timber provides small and marginal farmers with supplementary income without affecting food crop production, enhancing rural resilience. India's 28.4 million hectares under agroforestry have the potential to expand beyond 53 million hectares. Policy support via GST rationalization on wood products will incentivize agroforestry, improve land productivity, and promote rural prosperity.

2.2 Strengthening Rural Economies

The industry supports over one million farmers and generates vast rural employment in harvesting, transportation, and processing, thereby diversifying income sources and reducing urban migration.

2.3 Environmental Sustainability

Agroforestry enhances carbon sinks and supports a circular economy. India's agroforestry currently sequesters about 60-65 million tonnes of carbon annually, with potential for significant growth supported by appropriate policy measures.

2.4 Employment and MSME Growth

Employing around 3.5 million unskilled and semi-skilled workers, largely within MSMEs concentrated in semi-urban and rural clusters, the sector is labour-intensive and sensitive to pricing. GST reductions will catalyze demand, MSME formalization, and overall tax compliance.

2.5 Alignment with National Initiatives

Lower GST will advance national goals including doubling farmers' incomes, environmental conservation, import substitution, affordable housing, and key government initiatives such as Make in India, Atmanirbhar Bharat, Vocal for Local, and Housing for All.

3.0 Policy Recommendations

We commend the Government for GST reductions on select wood products like bagasse boards and specific HSN codes, reflecting commitment to sustainability. However, a broader, integrated approach covering all products under Chapter 44 and wooden furniture (HSN 9403) is essential for maximizing benefits. The recent Quality Control Orders (QCOs) effective February 2025 mandate higher standards even for smaller producers, marking industry formalization progress. Extending the 5% GST slab to the full range of wood products will accelerate this process, enhance tax compliance and potentially increase GST revenues without any revenue loss.

A detailed note on each of the aforementioned points is attached here for your easy reference as Annexure.

Conclusion

Considering the above, FIPPI respectfully urges the Government of India to:

- Include all products classified under Chapter 44 and wooden furniture (HSN 9403) under the 5% GST slab.
- Recognize wood's unmatched sustainability and its vital role in climate change mitigation and rural livelihoods.
- Support industry formalization and foster MSME growth through GST rationalization.

Such measures will support agroforestry, empower farmers, strengthen rural economies, reduce import dependence, and further India's commitments on environmental protection and sustainable development.

We trust our representation will receive your favourable consideration.

Thanking You,

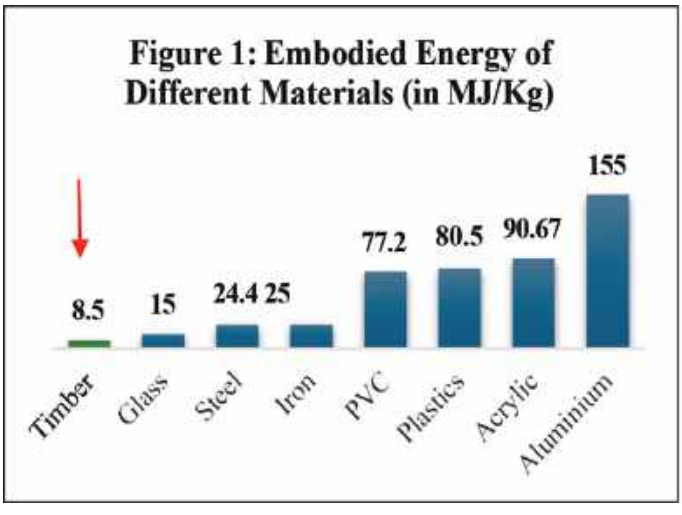
Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

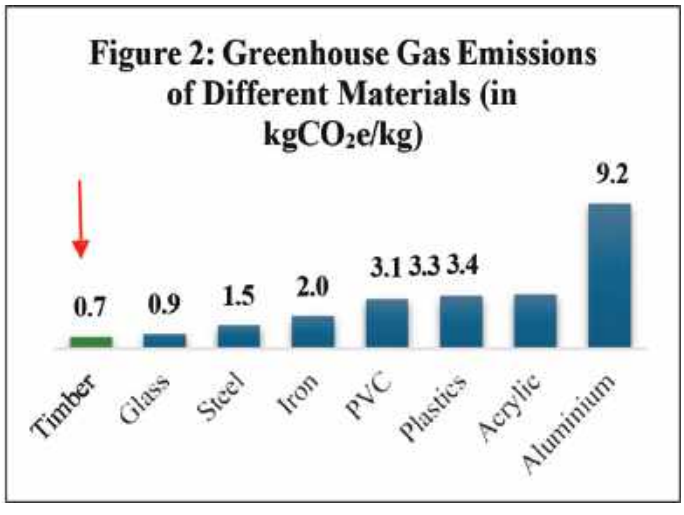
Annexure

1.0 Wood: The Benchmark of Sustainability in Construction and Furnishing Materials

Among construction and furnishing materials, wood stands unparalleled in terms of sustainability. Timber is a naturally renewable, climate-positive resource with a considerably lower life-cycle economic cost. It is biodegradable, sequesters carbon, and requires significantly less energy for production and processing. In contrast, commonly used alternatives such as steel, aluminium, PVC, glass, cement, and polymers depend heavily on non-renewable raw materials and are manufactured through energy-intensive, pollution-generating industrial processes. While these materials contribute substantially to environmental degradation, timber—especially when sourced from agroforestry—actively promotes afforestation, carbon capture, and supports sustainable livelihoods in rural communities.

1.1 Promoting Wood Use as a Direct and Effective Climate Mitigation Measure





Compared to widely used alternatives like steel, aluminium, PVC, and glass, the production and utilization of wood offer significantly greater environmental benefits. Through photosynthesis, trees absorb carbon dioxide and release oxygen, making wood a uniquely climate-positive material. On average, a growing tree absorbs about one ton of carbon dioxide per cubic metre while producing approximately 0.7 tons of oxygen. Furthermore, wood has the lowest embodied energy among major construction and furnishing materials—requiring only 8.5 megajoules per kilogram (MJ/kg), in contrast to 24.4 MJ/kg for steel, 25 MJ/kg for iron, and substantially higher energy inputs for plastics, acrylics, PVC, and aluminium. Lower embodied energy translates to reduced processing energy demands and correspondingly lower greenhouse gas emissions. Consequently, timber's greenhouse gas emissions are the lowest, with just 0.7 kg of carbon dioxide equivalent (CO_2e) emitted per kilogram—significantly less than emissions from glass, aluminium, steel, or PVC products.

These intrinsic environmental advantages—including carbon storage, low embodied energy, minimal processing energy requirements, and the lowest emissions profile—position wood as the most climate- compatible material

available. Thus, fostering increased use of wood and wood-based products in construction and furnishing represents a clear and impactful strategy for climate change mitigation.

1.2 Advancing India's NDC Targets and Mission LiFE through Promotion of Wood Products

Promoting wood and wood-based products—particularly by rationalizing GST rates on items under Chapter 44 and HSN Code 9403—is closely aligned with India's climate commitments under the Paris Agreement as well as the Hon'ble Prime Minister's Mission LiFE (Lifestyle for Environment) initiative.

Under its Nationally Determined Contributions (NDCs), India has pledged to create an additional carbon sink of 2.5 to 3 billion tonnes of CO_2 equivalent by 2030 through enhanced forest and tree cover. Unlike materials such as steel, aluminium, glass, or PVC, timber serves as a long-term carbon sink. Its production and use not only generate minimal emissions but also actively sequester carbon dioxide, with an average absorption of approximately one ton of CO_2 per cubic metre of growing timber. Consequently, greater utilization of sustainably sourced wood and wood-based products directly incentivizes agroforestry and plantation timber cultivation, effectively driving progress toward India's NDC goals.

In addition, the widespread adoption of agroforestry supports the core objectives of Mission LiFE, which promotes responsible consumption, sustainable lifestyles, and collective environmental stewardship. Expanding green cover through agroforestry enhances climate resilience, biodiversity within agricultural ecosystems, carbon sequestration, and helps mitigate pollution and climate change impacts. Encouraging wood product use thereby fosters a circular and participatory sustainability model.

The Indian Plywood and Panel Industry is distinctively positioned within this sustainable framework, meeting approximately 92% of its raw material needs through agroforestry and plantation timber, thereby ensuring no disruption to natural forests. With strong linkages to farmers and rural economies, the industry supports over one million farmers by providing stable, year-round incomes that alleviate seasonal agricultural uncertainties. By sourcing timber sustainably, this sector actively contributes to expanding green cover, boosting carbon sequestration, and advancing a broader circular economy.

2.0 The Indian Plywood and Panel Industry: A Farmer-Centric, Pro-Rural, and Environmentally Sustainable Sector

With approximately 65% of India's population living in rural areas and nearly 47% reliant on agriculture for their livelihoods, bolstering the rural economy is essential. The Indian Plywood and Panel Industry contributes significantly to this objective by sourcing 92% of its timber needs from agroforestry. This approach supports small and marginal farmers, strengthens rural economic resilience, and plays a vital role in advancing environmental sustainability.

2.1 Sustainable Raw Material Sourcing: Supporting Small and Marginal Farmers through Agroforestry

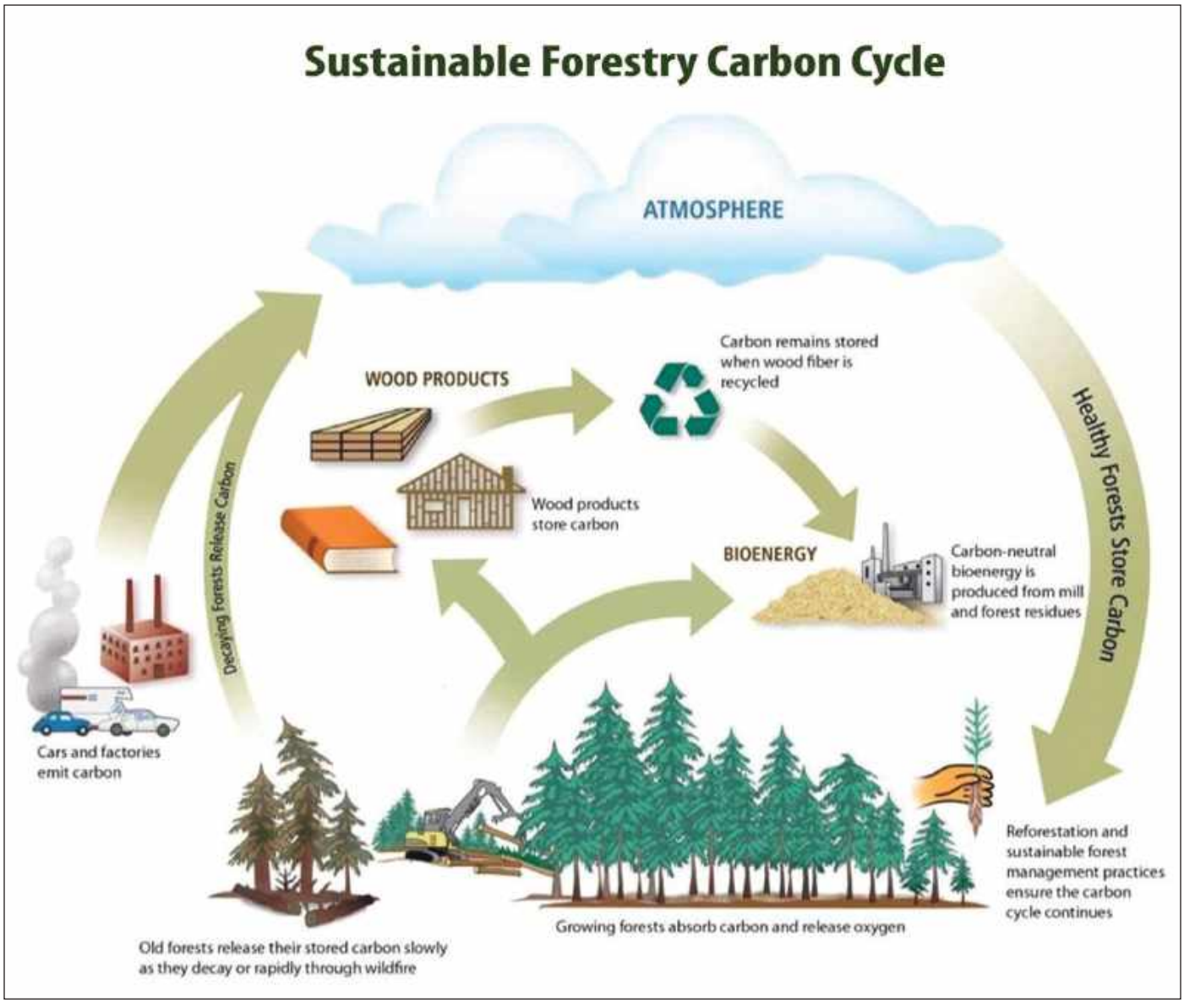
The Indian Plywood and Panel Industry primarily depends on timber sourced from agroforestry, offering small and marginal farmers a reliable supplementary income without compromising food crop production. By integrating tree cultivation within agricultural lands, farmers can better manage seasonal crop yield fluctuations and reduce economic vulnerabilities. Currently, India has approximately 28.4 million hectares under agroforestry, with the potential to expand beyond 53 million hectares—demonstrating significant opportunity for growth. Providing policy support that promotes agroforestry, such as reducing GST rates on wood and wood-based products (including agroforestry- sourced timber, plywood, medium-density fibreboard, particle board, veneers, wooden doors, and furniture), would directly incentivize farmers, improve land productivity, and contribute substantially to rural prosperity and environmental sustainability.

2.2 Strengthening Rural Economic Resilience Through the Indian Plywood and Panel Industry (Pro- Rural)

The Indian Plywood and Panel Industry plays a vital role in driving rural economic activity, especially in areas hosting processing units for farm-grown timber. Beyond supporting more than one million farmers, the industry creates significant employment opportunities for rural workers involved in harvesting, transportation, processing, and related activities. This diversified economic engagement enhances income security in rural regions, alleviating dependence solely on agriculture. By fostering year-round livelihoods and curbing distress-driven urban migration, the sector significantly contributes to the economic resilience of rural communities.

2.3 Driving Environmental Sustainability Through the Indian Plywood and Panel Industry (Pro- Sustainable)

Trees capture carbon dioxide from the atmosphere, and a substantial portion of this carbon remains locked within the wood's biomass even after harvesting and processing into various products—ranging from building frames to doors



or kitchen units. When timber reaches the end of its primary use, provided it is recycled into another durable product—such as transforming a timber facade into bio- insulation—the carbon stays securely stored within its new form. While conventional buildings made from concrete and steel typically generate around 2,000 metric tons of CO2 emissions, an equivalent timber structure can store a comparable amount of carbon. Beyond reducing carbon emissions by replacing carbon-intensive materials, timber construction also drives demand for sustainably managed forests. This demand supports forest stewardship practices that lower the risk of wildfires and protect wildlife habitats.

The industry's sourcing practices, primarily through agroforestry, make a meaningful contribution to environmental sustainability. By promoting the expansion of agroforestry across rural landscapes, the sector enhances carbon sinks, boosts carbon sequestration, increases green cover, and supports the growth of a circular manufacturing ecosystem. India currently has an estimated 28.4 million hectares under agroforestry, which sequesters approximately 60–65 million tonnes of carbon annually. With the potential to expand agroforestry to over 53 million hectares, fostering this growth—particularly through policy measures such as reduced GST rates on wood and wood products—could significantly amplify carbon sequestration efforts and environmental benefits.

3.0 Significant driver of employment, MSME growth and alignment with Government priorities

Beyond its strong connections to farmers and the rural economy, the Indian Plywood and Panel Industry is a significant driver of employment, MSME growth, and alignment with government priorities. The sector is predominantly labour-intensive and is primarily made up of micro, small, and medium enterprises (MSMEs), many of which are based in semi-urban and rural clusters, playing a crucial role in inclusive economic development.

4.0 Timber construction creates jobs and boosts the economy

From sustainable forest management to skilled carpentry, promoting the use of locally sourced, sustainable wood generates employment and stimulates local economies. Recognizing both the environmental and economic benefits of wood in construction, several national governments are now introducing mandates for incorporating timber in new buildings. For example, the French government requires that all new public buildings contain at least 50% wood, while Amsterdam plans for 20% of new homes to be constructed using timber or other bio-based materials starting in 2025.

As timber becomes the preferred construction material, it is expected to drive the expansion of mass timber supply chains globally. This will lead to the growth of factories producing cross-laminated timber (CLT), the most widely used mass timber product today. However, this expansion must be managed in a climate-smart manner to ensure a net-positive environmental impact.

To align with the principles of a climate-smart forest economy, the supply of sustainable wood must scale appropriately with rising demand. This requires implementing comprehensive carbon management strategies across the timber value chain—including carbon sinks, storage, substitution benefits, and enforcing regulations such as avoided deforestation laws and certification schemes—to prevent overexploitation and forest degradation.

In East Africa, the Climate Smart Forest Economy Program (CSFEP) is actively developing a climate- smart forest economy across Kenya, Tanzania, and Uganda. Partnering architecture, engineering, and construction firm BuildX Studio, CSFEP is establishing a regional value chain and market that will drive demand for sustainable timber in construction while supporting reforestation efforts. The program is engaging key stakeholders and investors to build a collaborative network aimed at fostering growth and overcoming challenges within the timber value chain.

5.0 A Labour - Intensive Sector Providing Extensive Employment for Unskilled and Semi-Skilled Workers

In addition to supporting farmers, the Indian Plywood and Panel Industry currently employs approximately 3.5 million people across the country, with the majority being unskilled and semi-skilled workers. These individuals are engaged in various stages of the supply chain, including harvesting, transportation, processing, and related activities, making the sector highly labour-intensive. Reducing GST on products manufactured by this industry would directly contribute to the creation of additional job opportunities, thereby fostering inclusive economic growth.

6.0 Predominantly MSME-Driven Industry: GST Reduction Will Catalyze MSME Growth

Approximately 80% of the Indian Plywood and Panel Industry consists of unorganized micro, small, and medium enterprises (MSMEs) whose operations are highly sensitive to pricing. The current elevated GST rates on agroforestry-sourced wood and wood panels pose a significant compliance challenge for these smaller firms. Lowering GST on these products will not only generate increased demand, creating a positive multiplier effect for MSMEs, but will also encourage many unorganized units to formalize and comply with the tax system, thereby enhancing overall tax compliance.

7.0 Timber buildings promote healthier living and working environments

An increasing amount of research highlights people's innate preference for connection with nature, and biophilic building designs—those that harmonize with natural elements—cater to this need. Living and working in timber-filled spaces offers both physical and mental health benefits. For instance, a study by Rice et al. revealed that individuals instinctively perceive wood as fostering healthier environments, often describing timber interiors as warm, comfortable, relaxing, inviting, and natural. Additionally, research from Slovakia demonstrated that spaces constructed with natural materials and fabrics enhance work efficiency and creativity, while a wooden hospital waiting room was shown to reduce stress levels among visitors.

8.0 Alignment of the Indian Plywood and Panel Industry's Growth with Government Initiatives and National Priorities

The Indian Plywood and Panel Industry is well-positioned to support national development objectives. Implementing a lower GST rate on agroforestry-sourced wood and wood panels would bolster sectoral growth and simultaneously advance key policy goals such as doubling farmers' incomes, improving environmental outcomes through increased carbon sequestration, promoting domestic manufacturing over imports, and facilitating affordable housing by lowering the cost of wood-based construction and furnishing materials. These benefits directly reinforce flagship government initiatives including Make in India, Atmanirbhar Bharat, Vocal for Local, and Housing for All.❑

IS 710: Shaping the Course of India's Marine Plywood Standard

Dr. Richa Bansal
Assistant Director
Federation of Indian Plywood and Panel Industry (FIPPI)

1. Background

Indian standard, IS 710 for Marine Plywood—Specification was first published in 1957 to address the need for high-quality plywood that could withstand extreme environmental conditions. Plywood used in marine and river craft applications is exposed to temperature variations, humidity changes, and cycles of wetting and drying. Additionally, it must resist marine organisms that can degrade the material over time. Since commercially available plywood was found unsuitable for these demanding conditions, this specification was developed to ensure the use of appropriate raw materials, adhesives, and manufacturing processes. The aim was to produce a plywood variant that could sustain prolonged exposure to moisture and mechanical stress without compromising structural integrity.

Over the years, IS 710 has undergone multiple revisions in the years 1976, 2010 and then in 2024 to meet industry demands, improve performance, and promote sustainability. However, the scope of the standard remains largely restricted and needs upgradation based on evolving market changes, use of marine plywood in high end building construction and near marine environments, advancements in technologies and to align our Indian Standards with global benchmarks. Moreover, the preservation methods outlined in the current standard our outdated and are not used in current manufacturing practices. These gaps underscore the urgency of a comprehensive revision.

This article examines the current scope and limitations of IS 710, compares it with international standards, and outlines the need for future revisions to make India's marine plywood specification more relevant, competitive, and globally aligned.

2. Introduction

Plywood is a versatile panel product made from layers of wood veneers bonded together. Different species are used for manufacturing various grades of plywood, each tailored to specific end uses. Among these, marine and shuttering grades are considered the most durable, offering enhanced strength and long service life.

Marine plywood is engineered for applications where moisture exposure is high—such as boat building, dock construction, and other marine structures—and is bonded with water-resistant phenolic glue. Traditionally, it was made from durable tropical hardwoods and specialized manufacturing processes. Today, however, most plywood, including marine grade, is produced from plantation timber, which is generally less naturally durable than forest-grown timber.

To withstand harsh marine environments—saltwater, humidity, and weathering—marine plywood must meet stringent standards, including IS 710 (India), BS 1088 (UK). These standards ensure resistance to moisture, fungi, and other marine-related challenges. The scope of IS 710 covers the requirement for materials, manufacture and performance of marine plywood suitable for the construction, repair and maintenance of marine and river craft, pontoons and the like. Such plywood must endure temperature variations, humidity changes, repeated wetting and drying, and attack by marine organisms. However, in practice, marine plywood is used in building construction and marine-influenced environments, where exposure is typically limited to high humidity, salt-laden air, and intermittent moisture rather than exposure to direct sea water.

However, given the pace at which other countries have moved forward, it is imperative that we adopt the latest global developments and align our standards with current international practices. BS 1088 was originally developed for the specification of plywood to meet the requirements of use in marine craft. While most countries—including Australia, New Zealand, and even the United Kingdom—have already revised and broadened their standard for

marine plywood and enlarged the scope over the years to reflect new technologies and expanding applications, such as vehicle bodies and general building work where replacement in the event of failure might be difficult or costly and attraction of customers to use this product in high end building construction, moist conditions and coastal areas, our revision process has been prolonged, facing various ups and downs and resistance from multiple directions.

With the implementation of the Quality Control Orders now enforcing Indian standards, it is essential to adopt new technologies and preservation methods—such as glue-line poisoning—to align with international standardization process such as of BS 1088 for marine plywood-requirements and its scope reflects the wider range of use specifying requirements for two classes of marine plywood: standard; and lightweight, intended for use primarily in the manufacture of marine craft and in other marine and waterway applications and also the use of marine plywood in building construction. To keep pace with global practices and market demand, IS 710 must be revised and its scope expanded to incorporate these developments.

3. Present Scope of IS 710

This standard covers the requirement for materials, manufacture and performance of marine plywood suitable for the construction, repair and maintenance of marine and river craft, pontoons and the like.

Compared to IS:303 BWP grade, IS:710 includes significantly more stringent requirements across several key parameters:

Tensile Strength – Higher tensile strength to withstand structural stresses.

Glue Shear Strength – Enhanced adhesive bond performance under variable moisture conditions.

Modulus of Elasticity (MoE) and Modulus of Rupture (MoR) in (Dry & Wet) – Critical for mechanical integrity, not required under IS:303 BWP.

Preservative Retention – Minimum of 12 kg/m^3 for ACC or CCB, ensuring long - term durability in marine environments, a requirement absent in IS:303 BWP.

These criteria collectively reflect the robust demands of marine-grade applications.

4. Comparative Study of IS 710, BS 1088 & AS/NZS 2272

4.1. Comparison of Scope of Use of Marine Plywood in IS 710, BS 1088 and AS/NZS 2272

International standards for marine plywood are broader in scope than IS 710. For example, BS 1088 specifies two classes of marine plywood—standard and lightweight—intended not only for marine craft but also for building construction and vehicle bodies where durability is critical. Similarly, AS/NZS 2272 provides detailed requirements for timber species, veneer quality, bonding, and preservative treatments. The Table 1 given below provides a comparison of the scope of use of marine plywood in IS 710, BS 1088 and AS/NZS 2272.

Table 1: Comparison of Scope of Use of Marine Plywood in IS 710, BS 1088 and AS/NZS 2272.

Scope of Use		
IS 710: 2024 Marine Plywood-Specifications	**BS 1088: 2018 Marine Plywood-Requirements**	**AZ/NZS 2272: 2006 Plywood-Marine**
This standard covers the requirement for materials, manufacture and performance of marine plywood suitable for the construction, repair and maintenance of marine and river craft, pontoons and the like.	BS 1088 specifies requirements for two classes of marine plywood: • Standard; and • Lightweight, intended for use primarily in the manufacture of marine craft and in other marine and waterway applications. The requirements also take into consideration the use of marine plywood in building construction. **(Owing to its nature, marine plywood is also suitable for use in extreme climates and in such applications as vehicle bodies and general building work where replacement in**	This Standard specifies requirements for the manufacture, grading and finishing of plywood intended for marine use. It describes the basic marine plywood product. Particular application may require additional processing, preservative treatment or surface finishing. This Standard also

	the event of failure might be difficult or costly. The scope of BS 1088 reflects the wider range of use. The durability of marine plywood is expected to be superior to that of plywood of the same species that meets only the minimum requirements for the technical class of plywood for exterior conditions according to BS EN 636). BS 1088 addresses in particular the resistance of plywood to bio deterioration and loss of bond strength with time. It does not make provision for other properties which might additionally be relevant in a particular end use. Plywood made in accordance with this standard might also need to meet additional requirements in legislation and/or standards specific to its end use that are not covered by this standard. With particular reference to building construction, experience has shown that rapid ingress of water at the panel edge during the build process can cause differential swelling in the core, resulting in localized catastrophic rupture of the wood fibres, thus giving the appearance of delamination. If subsequent integrity of the waterproof envelope of the building is not maintained, similar problems can arise. BS 1088 cannot make provision for such events since the choice of veneer species is based only on density and resistance to bio deterioration. ***NOTE 1:*** *Where marine plywood is to be used in building construction, attention is drawn to the Construction Products Regulations 2013 [1]. Conformity with these can be verified through demonstrating conformity with BS EN 13986.* ***NOTE 2:*** *When used in building construction, good site practice with particular reference to protection of the building elements against wetting is of the highest importance for ensuring the intended results for the building.*	specifies species of timber, veneer qualities, bond quality, joints, veneer construction, moisture content, dimensions and tolerances. finishing. formaldehyde emissions and branding. A series of performance requirements relating to species, and a procedure for evaluating and admitting new species are included. One bond type, Type A bond, is prescribed. Two face veneer grades A and O have been specified. Quality A veneer is to be specified where a high-quality clear finish is required and Quality O where the marine plywood product is to be overlaid with fibreglass or similar coatings or overlays. or painted with pigmented paint or varnish.

4.1.1. Proposed Revision in Scope of IS 710: 2024-Marine Plywood-Specifications

This standard covers requirements for materials, manufacture and performance of marine plywood suitable for the construction, repair and maintenance of marine and river craft besides certain other applications such as in building construction pontoons and the like. However, a growing share of plywood having more stringent performance under both dry & wet conditions is now used in coastal housing and marine-influenced environments, where exposure is typically limited to high humidity, salt-laden air, and intermittent moisture—not direct sea water.

To align the standard with international practices, it is proposed to revise IS:710 by introducing two distinct categories of marine plywood depending on their usage conditions.

Category 1: Marine-Grade Plywood – High Severity: For use in high-severity applications such as boat building, docks, or structures in direct contact with seawater.

Category 2: Marine-Grade Plywood – Moderate Severity: For use in coastal housing, marine-adjacent infrastructure, and construction where humidity and salt-laden air are prevalent, but direct seawater contact is absent.

The dual-category system provides performance-based flexibility by distinguishing grades according to

actual exposure conditions, thereby broadening the scope of the standard. It improves cost efficiency, making marine-grade plywood more accessible for coastal and other cost-sensitive applications, while promoting sustainability through reduced use of harmful chemicals and energy-intensive treatments. The system aligns IS:710 with international practices such as those in New Zealand and the UK and meets the growing market demand for high-strength plywood suited to moderate environmental exposure in India's coastal development sector.

4.2. Comparison of Preservative retention of IS 710, BS 1088 and AS/NZ 2272

IS 710 currently requires pressure impregnation with fixed-type preservatives, with a minimum retention of 12 kg/m^3 for ACC or CCB, or 100 kg/m^3 for creosote-based treatments. In contrast, BS 1088 does not mandate preservative treatment, and AS/NZS 2272 provides guidelines based on hazard classes. A comparison of preservative retention of IS 710, BS 1088 and AS/NZ 2272 are given in Table 2.

Table 2: Comparison of Preservative retention of IS 710, BS 1088 and AS/NZ 2272.

Preservative Retention		
IS 710: 2024 Marine Plywood-Specifications	**BS 1088: 2018 Marine Plywood-Requirements**	**AZ/NZS 2272: 2006 Plywood-Marine**
When tested as per IS 2753 (Part 1 and Part 2) the plywood shall have a retention of preservative as specified in 5.3. 5.3. The board shall be given treatment by pressure impregnation with fixed type either water soluble or oil-based preservatives and having retention of a minimum of 12 kg/m^3 in case of ACC (acid-copper-chrome) or CCB (copper-chrome boron) compositions as specified in IS 10013 (Part 1) and (Part 3) respectively or 100 kg/m^3 in case of creosote or creosote-fuel oil composition as specified in Annex A of IS 5539, with adequate penetration.	BS: 1088 does not mandate preservative treatment for marine plywood. The timber species of the veneers used in the manufacture of marine plywood shall be selected according to Table 1 so that the required durability is obtained. Where a range of durability classes is given for a species or species mixture, the least durable class shall be used as the basis for conforming to Table 1. ***NOTE 1:*** *Where an increase in durability is required it might be necessary to apply preservative treatment, either to the veneers before bonding, to the adhesive (which will diffuse into the veneers during hot pressing), or to the finished plywood, but only if incorporated by the original manufacturer. Guidance on preservative treatment is given in DD CEN/TS 1099.* ***NOTE 2:*** *Plywood for marine use is employed in many different circumstances and the nature of the hazard (wet rot, insect attack, soft rot, marine borer attack) to which it might be exposed can vary widely. Where resistance to marine borer attack is desirable, e.g. if marine plywood is likely to come into direct contact with water, it is important that species with an adequate resistance to marine borer attack are used. BS EN 350 includes a limited list of species having such resistance, but it is not exhaustive and other species may also be used if adequate resistance to marine borers can be demonstrated from previous experience or by testing.*	On special order, marine plywood may be treated against insect and fungal attack or be treated with fire-retardant chemicals. Where preservative treatment against insect and fungal attack is required, the preservative, preservative penetration and preservative retention shall be in accordance with AS/NZS 1604.3 and as specified by the purchaser. ***NOTES:*** 1. *In Queensland the Timber Utilization and Marketing Act, 1987, and in New South Wales the Timber Marketing Act, 1977, require prior approval of a treatment and registration of a brand before timber (including veneer and plywood) offered for sale in either of these states, can be described as preservative treated. Detailed information about the requirements of such legislation may be obtained from the State forestry departments concerned.* 2. *Some chemical treatments may affect the mechanical properties of marine plywood.*

Table 1: (BS 1088-Marine Plywood- Requirements).

Table 1 — *Durability requirements for standard and lightweight marine plywood*

Class	Requirements
Standard	The wood species used shall be from those listed in BS EN 350:2016, Annex B, as having natural biological durability Class DC 3 or better and with a nominal density >500 kg/m³ at 12% moisture content The aim shall be to exclude sapwood, but for practical reasons up to 5% sapwood per veneer shall be permitted, assessed on a visual inspection of the surface area of the veneer prior to assembly
Lightweight	The wood species used shall be from those listed in BS EN 350:2016, Annex B, as having natural biological durability Class DC 4 or better and with a nominal density ≤500 kg/m³ at 12% moisture content The aim shall be to exclude sapwood, but for practical reasons up to 5% sapwood per veneer shall be permitted, assessed on a visual inspection of the surface area of the veneer prior to assembly
NOTE Ideally, all veneers consist entirely of heartwood but, for practical reasons, a small percentage of sapwood is permitted.	

Where species to be used, and similarly sources of the wood, are not listed in BS EN 350:2016, Annex B, it shall be demonstrated that the required natural durability class in accordance with BS EN 350 has been met and the proposal presented according to BS EN 350:2016, Annex G.

4.2.1. Proposed Revision in Preservative Treatment of IS 710: 2024- Marine Plywood-Specifications

Category 1: Marine-Grade Plywood – High Severity: For use in high-severity applications such as boat building, docks, or structures in direct contact with seawater.

- The board shall be given treatment either by:
  a) Pressure impregnation: 12 kg/m³, OR
  b) Diffusion at veneer stage: 12 kg/m³
- Minimum preservative retention:
  a) 12 kg/m³ for ACC or CCB (IS 10013 Parts 1 & 3), or
  b) 100 kg/m³ for creosote or creosote-oil mixtures (Annex A of IS 5539)

As per AS/NZS: 1604.1, for plywood exposed to marine waters, Hazard Class 6 (H6), the minimum preservative retention is given in the Table 7.3 given below:

Table 7.3: Minimum preservative retention in the penetrations zone – Hazard class H6.

(Individual piece; percent mass/mass based on the oven-dried mass of the test specimen)

Triadimefon + cyproconazole[a,b]			
Glueline treatment[c]		Surface treatment[d]	
Triadimefon	Cyproconazole	Triadimefon	Cyproconazole
0.095	0.0097	0.186	0.025

[a] An insecticide treatment shall also be applied as: an envelope treatment; a veneer treatment; a glueline treatment; or a glueline with face veneer treatment, in accordance with Table 3.3(A) or Table 3.3(D), at retentions for use in all regions.

[b] For softwood veneer not thicker than 4.3 mm.

[c] Retention in the cross-section.

[d] Retention in the outer 2 mm of the surface veneers.

The preservative retention mentioned in the table above is equivalent to 6 kg/m^3. This highlights the need to revise and upgrade our Indian Standard, IS 710 in alignment with international standards.

Category 2: Marine-Grade Plywood – Moderate Severity: For use in coastal housing, marine-adjacent infrastructure, and construction where humidity and salt-laden air are prevalent, but direct seawater contact is absent.

- Glue-line treatment to ensure protection against borers and termites.
- Preservative levels and treatment methods aligned with international best practices (AS/NSZ: 1604.1) to balance cost-effectiveness with durability.
- For testing and analysing the treated wood, penetration spot tests and retention tests are recommended based on AS/NSZ: 1604.3

Preservative retention given in AS/NSZ: 1604.1

The New Zealand standards AS/NZ 1604.1 for preservative treatment of wood and wood-based panel products includes glue line treatment for plywood with organic chemicals. Some of the recommended chemicals are given in table below:

Table 4.3 (B): Minimum retention of glueline and surface treatment for plywood and LVL – Hazard class H3.

(Individual piece; percent mass/mass based on the oven-dried mass of the test specimen)

Botanical classification	Preservative type	
	Waterborne	Oil
	CCA (Cu + Cr + As)	Creosote[a]
Softwood	2.0	40.0
Hardwood	1.2	22.3
Softwood[b]	2.0	40.0
Hardwood[b]	1.2	15.2

[a] Creosote may be in the undiluted form or as the active component of pigment-emulsified creosote (PEC).

[b] Double preservative-treated with CCA and creosote or PEC.

Depth and uniformity in distribution of chemicals are identified by penetration spot tests of preservative chemicals using the test methods described in AS/NSZ 1604.3 and retention is determined through colorimetry.

Conclusion

The evolution of IS 710 reflects India's commitment to producing marine plywood that is both durable and environmentally responsible. Each revision—from its inception in 1957 to the latest update in 2024—has responded to technological advances, market demands, and sustainability concerns. Aligning IS 710 with global standards such as BS 1088 and AS/NZS 2272 and adopting a dual-category framework for different severity levels, will not only enhance product performance but also expand applications in coastal construction and export markets. A forward-looking revision will keep India's plywood industry competitive, while ensuring safety, quality, and ecological balance.❑

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"INDIAN WOOD & ALLIED PANELS"

A Quarterly Journal on Plywood and Panel Industry

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FIPPI's Representation on BIS Support for Micro Enterprises in QCO Implementation

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY
REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969
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FIPPI/16/3-3-2025 July 3, 2025

To,
The Director General
Bureau of Indian Standards (BIS)
9, Bahadur Shah Zafar Marg,
Manak Bhavan,
New Delhi-110002

Subject: BIS Support to Micro Entrepreneurs in the Plywood and Panel Sector Regarding Mandatory QCO Implementation.

Respected Sir,

It has been brought to our notice the serious challenges being faced by Small and Micro Enterprises across the country due to the implementation of mandatory Quality Control Orders (QCOs) in the plywood and panel sector.

We, on behalf of the Federation of Indian Plywood and Panel Industry (FIPPI) fully support the Government of India's vision for quality manufacturing under the "Make in India" and "Zero Defect Zero Effect" initiatives. However, the current QCO enforcement has created significant distress among thousands of traditional, family-run manufacturing units. These enterprises, which have long catered to the needs of common consumers, are struggling to navigate the technical, procedural, and compliance-related requirements, in the absence of structured awareness, support and infrastructure. Most of these Micro Entrepreneurs lack trained technical staff and cannot afford high-cost consultants or equipment necessary to comply with BIS standards.

There have been widespread reports of regulatory enforcement being carried out without sufficient communication or hand-holding, often resulting in factory inspections, product seizures, or threat of penalties—leaving Small manufacturers demoralized and uncertain about their future when QCOs became mandatory for them in the month of May 2025. Such an approach erodes confidence and installs fear in genuine business owners who are struggling to comply.

We strongly advocate that the Micro Enterprises need to be guided and supported through a phased, empathetic implementation process, rather than being subjected to sudden and punitive actions once the compliance for micro enterprises becomes mandatory by the end of August 2025.

1. There is no structured framework to deal with non-conforming or pre-QCO stock, leading to massive losses to Small/Micro units. A transition window, and a mechanism for conditional clearance or graded implementation, may be introduced for existing stock and ongoing operations.
2. BIS inspections to be carried out in Micro Entrepreneurs with adequate dialogue or support with objective of encouraging them to comply with IS standards. Enforcement actions such as goods seizure, threats of prosecution, and penal notices may be substituted with hand-holding approach with such enterprises which are

barely surviving due to shortage of wood and are unaware of these new mandates.

3. Relaxation in SIT (Scheme of Inspection and Testing) Compliance for Micro scale plywood units such as (i) maintaining in-house laboratories should not be compulsory (ii) Make product-level control testing non-mandatory. (iii) The requirement to maintain detailed test records should not be compulsory.
4. Compliance for micro enterprises shall be mandatory by the end of August 2025. Therefore, a planned approach is necessary to bring these enterprises under BIS certification. Please cconsider measures such as organising regional targeted camp for BIS facilitation, training programs, establishment of common facility centres for testing and extended transition time for such enterprises, and more inclusive stakeholder consultation processes

These proposed relaxations shall provide much-needed relief to micro scale plywood manufacturers while ensuring that quality standards are met. This micro level sector in wood-based manufacturing has played a vital role in employment generation and affordable housing materials supply. Without meaningful support, many these units may face closure, impacting not only livelihoods but also the supply chain to rural and low- income markets.

We request your urgent attention and a consultative approach to address these concerns and look forward to your support in ensuring that QCOs enhance, rather than erode, the foundation of India's wood-based ecosystem.

With sincere regards,

Rajesh Mittal
President
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

Copy to: -

Director,
DPIIT with request to take up this matter with BIS

FIPPI's Request for Mandatory Use of BIS-Certified Plywood & Panels in Furniture

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

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FIPPI/18A-1-2025 July 2, 2025

To,

Shri Amardeep Singh Bhatia, Secretary
Department for Promotion of Industry and Internal Trade (DPIIT)
Vanijya Bhawan, New Delhi

Shri Sanjay Kumar Agarwal, Chairman
Central Board of Indirect Taxes and Customs (CBIC), Department of Revenue,
Ministry of Finance, North Block, New Delhi

Shri Pramod Kumar Tiwari, Director General
Bureau of Indian Standards (BIS), Manak Bhawan, New Delhi

Subject: Effective Implementation of Quality Control Orders for Plywood, Particle Boards and MDF and Furniture – Regarding Use of BIS-Certified Raw Material Component in Furniture.

Sir,

The Government of India (DPIIT) has enforced specific quality standards for plywood and panel products entering the Indian market through the implementation of the 'Plywood and Wooden flush door shutters (Quality Control) Order, 2024,' effective from 28th February 2025 and the 'Wood Based Boards (Quality Control) Order, 2024,' effective from 11th February 2025. Kindly also refer to the notification issued by DPIIT, published in the Extraordinary Gazette of India vide S.O. 801(E) dated 13.02.2025, advising all concerned industries and industry associations to take necessary steps for effective implementation of the Furniture (Quality Control) Order (QCO), 2025 with its enforcement of 13.02.2026.

Despite the Quality Control Orders (QCOs) for plywood, MDF, Particle boards and other panel products becoming mandatory from Feb 2025, requiring BIS certification in India, a concerning trend has emerged. Furniture items made with non-BIS certified panel products are being increasingly imported and marketed in India.

The quality of finished furniture is intrinsically linked to the quality of its components. Use of non-BIS certified plywood or panel materials as components of imported furniture undermines the very essence of the QCO compliance framework issued by DPIIT. This not only poses safety and quality risks to consumers but also creates an unlevel playing field for domestic furniture manufacturers who are required to comply with the QCOs.

Therefore, FIPPI strongly requests that the use of BIS-certified components, especially wood- based panels and plywood, be made explicitly mandatory under the QCO compliance framework for the furniture being imported and marketed in India. This needs to be particularly enforced at all Customs Import Ports.

We trust this will receive your due consideration for ensuring the QCOs' effective and meaningful implementation.

Thanking you,

Yours faithfully,

Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
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Revised Standards for IS: 3087 (Medium Density Particle Board) and IS: 12406 (Medium Density Fibreboard)

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1. Background

India's panel industry has undergone remarkable expansion over the past few decades, fueled by the rising demand for engineered wood products such as particle boards and medium density fibreboards (MDF). The growth of these industries has been driven by the booming construction and furniture sectors, the demand for value-added interiors, and a shift toward domestically produced, sustainable raw materials. Today, the production of particle board in India is around 4.5 million cubic meters while the MDF industry has also grown rapidly reaching a production of nearly 3.9 million cbm in 2024.

The evolution of particle board and Medium-Density Fibreboard (MDF) standards in India has progressed from a focus on general-purpose applications to incorporating more stringent requirements for quality, safety, and environmental impact. The Bureau of Indian Standards (BIS) has periodically revised and updated the standards governing these products aligning them with international practices. Recent mandates for Quality Control Orders (QCOs) further underscore the government's emphasis on regulating quality.

This article traces the evolution of particle board and MDF standards in India, highlighting the major revisions, their implications for the industry, and their implications for the industry.

A. IS 3087-Medium Density Particle Boards of Wood and other Lignocellulosic Materials for General Purpose — Specification

Particle board is a panel product manufactured from particles of wood or other lignocellulose material, for example, flakes, granules, shavings and slivers or splinters, combined by use of an organic binder together with one or more of the agents, such as heat, pressure, moisture and a catalyst.

Particle boards are recommended for use in interior locations. High moisture resistance (HMR) grade particle boards may be used in humid tropical wet conditions, whereas moisture resistance (MR) grade particle boards may be used in humid conditions subtropical and tropical dry, and regular grade (REG) may be used in arid/ semi-arid/temperate conditions.

The journey of particle board standardization began with separate standards for density classifications:

- **IS 3129:**1965 for low-density particle boards (specific gravity ≤ 0.4), and
- **IS 3087:**1965 for medium-density particle boards (specific gravity 0.5–0.9).
- **IS 3478:**1968 for high-density particle boards (specific gravity > 0.9),

Medium density particle boards are used for partitions, for doors, in the furniture industry, etc. The standard for medium density particle boards, IS 3087 was first formulated in 1965 to provide guidance in the manufacture of medium density particle boards. Based on the development in the particle board industry, the first revision was undertaken in 1985. In the first revision the types of particle boards were redefined and the requirements in respect of the physical and mechanical characteristics were also revised. Other significant changes related to the inclusion of test for screw withdrawal strength and deletion of that for thermal conductivity and tensile strength.

The second revision published in 2005 was undertaken to modify the scope and title of the specification making provision for the use of other lignocellulosic materials and to incorporate additional requirement of modulus of elasticity. In addition, the dimensional requirements, their

tolerances and the modulus of rupture requirements were redefined.

The third and the latest revision of this standard has been published in 2025 which covers classification and requirements of particle board for general purposes including furniture applications. This revision also gives requirements of formaldehyde content and formaldehyde emission. Both formaldehyde content and emission are specified under Class E1 and Class E2 out of which Class E1 is more stringent than Class E_2.

In this 2025 revision, the following major modifications have been incorporated: particle boards have been classified based on uses and service conditions, requirements have been modified against each classification of particle boards, and marking clause has been modified. In formulation of this standard, assistance has been derived from ISO 16893: 2016 'Wood-based panels — Particleboard'. Table 1 given below gives a detailed comparison of IS 3087 and its revisions over the years.

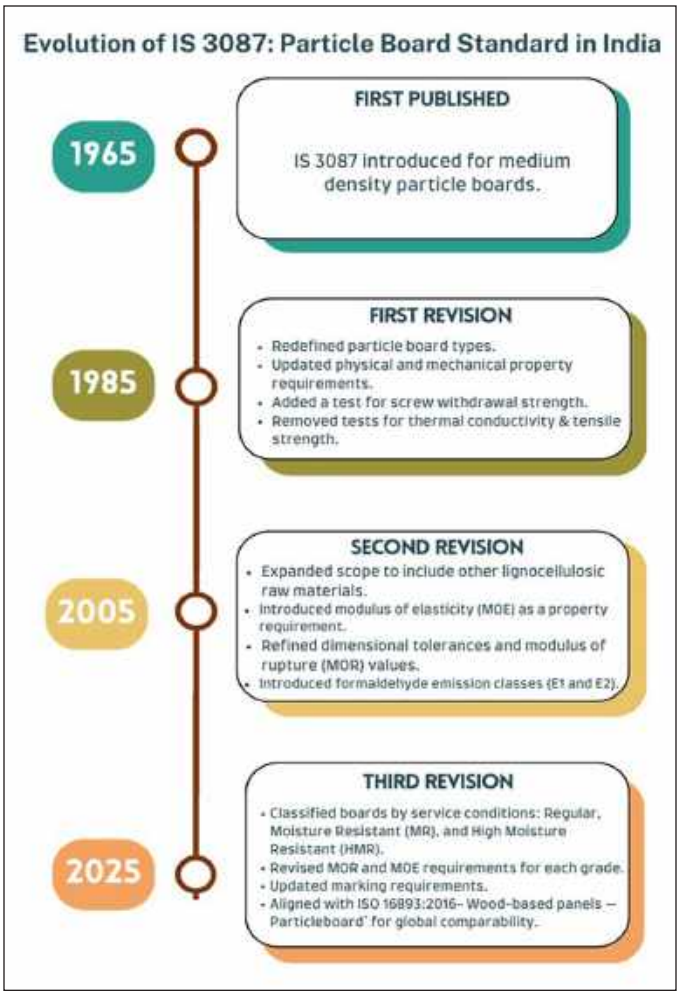


Table 1: Comparative Study of IS 3087 - Medium Density Particle Boards of Wood and other Lignocellulosic Materials for General Purpose — Specification and the major revisions over the years.

	IS 3087: 1985 (First Revision)	IS 3087: 2005 (Second Revision)	IS 3087: 2025 (Third Revision)
Title	Specification for Wood Particle Boards (Medium Density) for General Purposes	Particleboards of Wood and **Other Lignocellulosic Materials** (Medium Density) for General Purposes - Specification	Medium Density Particle Boards of Wood and Other Lignocellulosic Materials for General Purpose - Specification
Scope	1.1 This standard covers the requirements of medium density wood particle boards for general purposes, having specific gravity in the range of 0.5 to 0.9. 1.2 This standard does not cover veneered particle boards, moulded particle boards, high- and low-density particle boards or particle boards faced by impregnated paper surfaces.	1.1 This standard covers the requirements of medium density particle boards made of wood and/or other lignocellulosic materials for general purposes, having specific gravity in the range 0.5 to 0.9. 1.2 This standard does not cover veneered particle boards, moulded particle boards, high- and low-density particle boards or particle boards faced by impregnated paper surfaces.	1.1 This standard covers the requirements of medium density particle boards for general purposes having density in the range of 500 kg/m^3 to 900 kg/m^3. 1.2 This standard does not cover veneered particle boards, high-density and low-density particle boards, and particle boards faced with impregnated paper surfaces.

Class and Types	Class	Type	Designation	Class	Type	Designation	4.1 Medium density particle boards shall be classified according to Table 1. 4.2 Formaldehyde Classes In terms of formaldehyde class, each grade of particle boards shall be further classified in two classes as follows: a) Formaldehyde Class, E_1; and b) Formaldehyde Class, E_2.
	Flat Pressed, single layer	-	FPS	Flat Pressed, single layer	-	FPS	
	Flat pressed-three layer multilayer and graded	I II	FPT-1 FPT-2	Flat pressed-three layer multilayer and graded	I II	FPT-1 FPT-2	
	Extrusion pressed solid	-	XPS	Extrusion pressed, solid	-	XPS	
	Extrusion pressed, tubular	-	XPT	Extrusion pressed, tubular	-	XPT	
Dimensions	The sizes of the particle boards in mm shall be as follows:			8.1 The sizes of the particle boards shall be as follows:			8.1 Any dimensions (length and width) as agreed to between the manufacturer and the purchaser may be used and shall be declared by the manufacturer. The dimensions shall be measured as per IS 2380 (Part 2). Prevailing dimensions (length × width) of plywood boards are as given below:
	Length	4850 4800 3650 3600 3000 2750 2700	2400 2100 1800 1500 1200 1000 900	Length, mm	4800 3600 3000 2700 2400	2100 1800 1500 1200 1000	Length mm: 5490, 4880, 3660, 3050, 2745, 2440 / 2135, 1830, 1525, 1220, 1000, 915
	Width	1850 1800 1500 1200	1000 900 600 450	Width, mm	1800 1500 1200	1000 900 600 450	Width mm: 1830, 1525, 1220 / 1000, 915, 610, 305
	Thickness The thickness of particle boards shall be as given below: 6, 9, 12, 15, 18, 19, 22, 25, 27, 30, 35 and 40 mm			8.2. Thickness Unless otherwise specified, the thickness of particle boards shall be 6 mm, 9 mm, 12 mm, 15 mm, 20 mm, 25 mm, 30 mm, 35 mm, 40 mm and 45 mm.			The thickness of the particle boards shall be 3 mm, 4 mm, 6 mm, 9 mm, 11 mm, 12 mm, 15 mm, 16 mm, 17 mm, 18 mm, 22 mm, 25 mm, 30 mm, 35 mm, 40 mm, 44 mm and 45 mm. NOTE — Any other thickness as agreed to between the manufacturer and the purchaser may also be used.

<table>
<tr><td rowspan="6">Dimensional Tolerance</td><td colspan="2">The following tolerances on dimensions of finished boards shall be permissible:</td><td colspan="2">The following tolerances on dimensions of finished boards shall be permissible:</td><td colspan="2">The tolerances on the dimensions of finished particle boards shall be as given below:</td></tr>
<tr><td>Dimension</td><td>Tolerance</td><td>Dimension</td><td>Tolerance</td><td>Properties</td><td>Tolerance</td></tr>
<tr><td>a) Length-for all lengths</td><td>± 8 mm</td><td>i) Length</td><td>+6 mm
-0 mm</td><td>i) Length</td><td>± 5 mm/m</td></tr>
<tr><td>b) Width-for all widths</td><td>± 8 mm</td><td>ii) Width-for all widths</td><td>+3 mm
-0 mm</td><td>ii) Width</td><td>± 5 mm/m</td></tr>
<tr><td>c) Thickness-Above 25 mm</td><td>± 2.5 percent</td><td>iii) Thickness</td><td>± 5 percent</td><td>iii) Thickness, sanded / finished panel</td><td>± 0.3 mm</td></tr>
<tr><td>Thickness- upto and including 25 mm</td><td>± 5 percent</td><td>iv) Edge straightness

v) Squareness</td><td>2 mm per 1000 mm or 0.2 percent

2 mm per 1000 mm or 0.2 percent</td><td>iv) Edge straightness, Max

v) Squareness, Max</td><td>2 mm/m or 0.2 percent

2 mm/m or 0.2 percent</td></tr>
<tr><td>Requirement of modulus of elasticity</td><td colspan="2">Not specified</td><td colspan="2">11.8 Test for Modulus of Rupture and Modulus of Elasticity
The modulus of rupture and modulus of elasticity on test specimens specified in 10.2.1(t) and tested as prescribed in IS 2380 (part 4) shall have an average and minimum value not less than the values specified in (vi) and (vii) of Table 1, for modulus of rupture and modulus of elasticity, respectively.</td><td colspan="2">The particleboards shall conform to the requirements given in Table 3 to Table 8, as per the respective grades.</td></tr>
<tr><td>Marking Clause</td><td colspan="2">Each particle board shall be legibly marked near any of its edges with the following:
a) Name of the manufacturer or trademark, if any.
b) Designation of particle board
c) Thickness
d) Date of manufacture</td><td colspan="2">Each particle board shall be legibly marked near any of its edges with the following:
a) Name of the manufacturer or trademark, if any.
b) Designation of particleboard.
c) Thickness
d) Date of manufacture; and e) The criteria for which the particle board has been labelled as ECO-Mark.</td><td colspan="2">Each particle board shall be legibly and indelibly marked with the following particulars:
a) Manufacturer’s name and initials or recognized trademark, if any.
b) Grade and formaldehyde class of particle board.
c) Nominal dimensions (length, width and thickness).
d) Batch number; and
e) Date of manufacture.</td></tr>
</table>

Table 1 (IS 3087: 2025)- Classification of medium density particle board

Table 1 Classification of Medium Density Particle Board

(*Clause* 4.1)

Sl No.	Particle Board Grade	Service Conditions	Typical Examples of Applications (*See* Note)
(1)	(2)	(3)	(4)
i)	Regular (REG) grade — Grade A / Grade B	Dry conditions arid/semi-arid/temperate	General uses, carcass, furniture, cabinets, substrate for any decorative finish
ii)	Moisture resistance (MR) grade	Humid conditions subtropical and tropical dry	General uses, carcass, furniture, cabinets for kitchen and bathroom, moulded chair and table and substrate for any decorative finish
iii)	High moisture resistance (HMR) grade	High humid conditions tropical wet	General uses, furniture, cabinets for kitchen and bathroom moulded chair and table

NOTE — The examples given for different applications of particle boards are typical. Particle boards may be used for other similar applications, depending on the grade and service conditions as agreed between the manufacturer and purchaser.

Table 1 (IS 3087: 2005)- Physical and Mechanical properties (MOR and MOE) of various types of particle boards

Sl. No.	Properties	Flat Pressed, single layer	Flat pressed-three layer, multilayer, and graded		Extrusion pressed, solid (XPS)	Extrusion pressed, tubular (XPT)
			Grade I	Grade II		
i.	Modulus of rupture N/mm^2					
	a) Average	11	15	11	2	1
	b) Minimum	10	13	10	1.7	0.9
ii	Modulus of Elasticity N/mm^2					
	a) Average	2000	2500	2000	-	-
	b) Minimum	1800	2250	1800	-	-

Table 4 (IS 3087: 2025)- MOR and MOE requirements for Regular (REG) – Grade A Particle Board

Table 4 Requirements for Regular (REG) — Grade A Particle Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 3.0	> 3.0 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 13.0	> 13.0 to ≤ 20.0	> 20.0 to ≤ 25.0	> 25.0 to ≤ 32.0	> 32.0 to ≤ 40.0	> 40.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm^2, *Min*	13.0	13.0	12.0	11.0	11.0	10.5	9.5	8.5	7.0	IS 2380 (Part 4)
ii)	Moduels of elasticity (MoE), N/mm^2, *Min*	1 800	1 800	1 800	1 800	1 600	1 500	1 350	1 200	1 050	

Table 5 (IS 3087: 2025)- MOR and MOE requirements for Regular (REG) – Grade B Particle Board

Table 5 Requirements for Regular (REG) — Grade B Particle Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 3.0	> 3.0 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 13.0	> 13.0 to ≤ 20.0	> 20.0 to ≤ 25.0	> 25.0 to ≤ 32.0	> 32.0 to ≤ 40.0	> 40.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	11.5	11.5	11.5	10.5	10.0	9.5	8.5	7.0	5.5	IS 2380 (Part 4)

Table 6 (IS 3087: 2025)- MOR and MOE requirements for Moisture Resistance (MR) – Grade Particle Board

Table 6 Requirements for Moisture Resistance (MR) Grade Particle Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 3.0	> 3.0 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 13.0	> 13.0 to ≤ 20.0	> 20.0 to ≤ 25.0	> 25.0 to ≤ 32.0	> 32.0 to ≤ 40.0	> 40.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	13.0	13.0	13.0	13.0	13.0	12.0	11.0	8.0	7.5	IS 2380 (Part 4)
ii)	Modulus of elasticity (MoE), N/mm², *Min*	1 800	1 800	1 800	1 800	1 700	1 400	1 400	1 200	1 200	

Table 7 (IS 3087: 2025)- MOR and MOE requirements for High Moisture Resistance (HMR) – Grade Particle Board

Table 7 Requirements for High Moisture Resistance (HMR) Grade Particle Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 3.0	> 3.0 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 13.0	> 13.0 to ≤ 20.0	> 20.0 to ≤ 25.0	> 25.0 to ≤ 32.0	> 32.0 to ≤ 40.0	> 40.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	20.0	18.0	17.0	16.0	15.0	13.0	12.0	10.0	8.0	IS 2380 (Part 4)
ii)	Modulus of elasticity (MoE), N/mm², *Min*	2 300	2 200	2 100	2 000	1 900	1 700	1 600	1 600	1 400	

B. IS 12406- Medium Density Fibre Boards of Wood and Other Lignocellulosic Materials for General Purpose — Specification

Fibre board is a panel product manufactured from wood and other lignocellulosic fibres combined with synthetic resin or any other suitable binder. The panels are manufactured by the application of heat and pressure by a process in which the inter fibre bond is substantially created by blending with binders. Additives may be added during manufacturing to improve certain properties. Medium density fibre (MDF) boards are recommended for use in interior locations.

The Indian standard for MDF was first published in 1988 and subsequently revised in 2003, 2021 and 2025. In the first revision of 2003, detailed requirements for physical and mechanical properties were given for various thickness of boards. MDF boards have been classified in two grades I and II. Grade I boards may be used in Hazard Class 1 (Environment with relative humidity less than or equal to 70 percent so that equilibrium moisture content of MDF will not be more than 15 percent) and Hazard Class 2 (Environment with relative humidity more than 70 percent so that equilibrium moisture content of MDF will not be more than 20 percent), whereas Grade II boards may be used in Hazard Class 1 only.

The second revision of this standard was published in 2021 based on the experience gained in manufacturing and the research work carried out by the Indian Plywood Industries Research and Training Institute, Bengaluru. In this revision, the physical and mechanical requirements with respect to the erstwhile grades SBG I and SBG II were modified, and the grades were renamed as Grade 1 and Grade 2, respectively. Based on the properties and formaldehyde emission values, these boards were further classified into two grades (1 and 2) and then into two classes (E1 and E2). The physical and mechanical requirements of medium density fibre boards for both Grade 1 and Grade 2 were revised.

In the latest revision of the standard, MDF boards have been classified based on uses and service conditions as regular (REG) grade, moisture resistance (MR) grade and High moisture resistance (HMR) grade further classified as general purpose (GP) grade and furniture purpose (FP) grade. High moisture resistance (HMR) grade MDF boards may be used in humid tropical wet conditions, whereas moisture resistance (MR) grade MDF boards may be used in humid conditions subtropical and tropical dry, and regular grade (REG) may be used in arid/ semi-arid/temperate conditions. This standard also gives requirements of formaldehyde content and formaldehyde emission. Both formaldehyde content and emission are specified under Class E1 and Class E2 in which Class E1 is more stringent than Class E2. In this revision, requirements have been modified against each classification of MDF boards and marking clause has been modified. The table 2 given below gives a comparison of the revisions in this standard over the years.

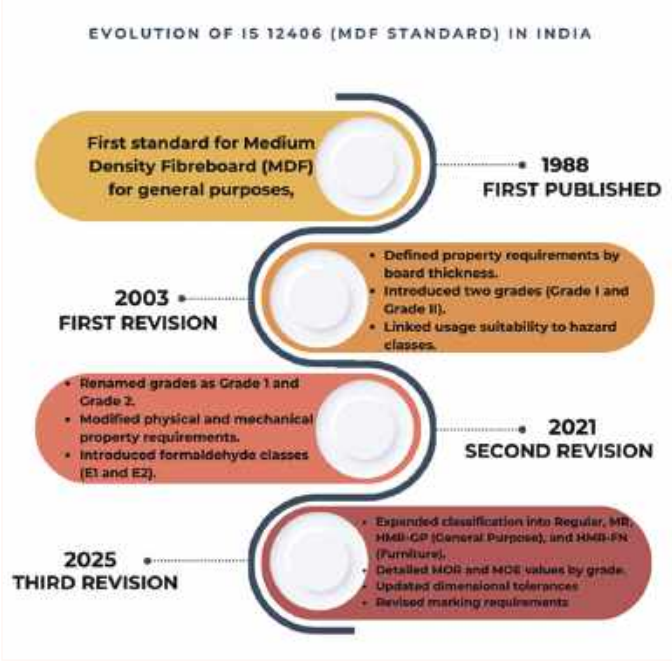


Table 2. Comparative Study of IS 12406- Medium Density Fibre Boards of Wood and Other Lignocellulosic Materials for General Purpose — Specification and the major revisions over the years.

	IS 3087: 2003 (First Revision)	IS 3087: 2021 (Second Revision)	IS 3087: 2025 (Third Revision)
Title	Medium Density Fibre Boards for General Purpose - Specification	Medium Density Fibre Boards for General Purpose - Specification	Medium Density Fibre Boards of Wood and **Other Lignocellulosic Materials** for General Purpose - Specification
Scope	1.1 This standard covers the requirements of medium density fibre boards for general purposes having density in the range of600-900 kg/m^3. 1.2 This standard does not cover veneered or laminated or prelaminated or other specially treated boards, moulded boards, etc.	1.1 This standard covers the requirements of medium density fibre (MDF) boards for general purposes having density in the range of 600 kg/m3 to 900 kg/m^3. 1.2 This standard does not cover veneered or laminated or pre-laminated or other specially treated boards, moulded boards, etc.	1.1 This standard covers the requirements of medium density fibre (MDF) boards for general purposes having density in the range of 600 kg/m3 to 900 kg/m3. 1.2 This standard does not cover veneered fibre boards, fibre boards faced with impregnated paper surfaces, moulded fibre boards, fibre insulation boards (see IS 3348), fibre hardboard (see IS 1658) and other specially treated fibre boards.

<table>
<tr><td>Class and Types</td><td colspan="2">Medium density fibre boards for general purpose shall be of one type only, that is, flat pressed single layer. It may, however, be of two Grades, Grade I and Grade II and may be designated as follows:
<table><tr><td>Grade</td><td>Designation</td></tr><tr><td>Solid Board Grade I</td><td>SBG I</td></tr><tr><td>Solid board Grade II</td><td>SBG II</td></tr></table></td><td colspan="2">MDF boards for general purpose shall be classified as one type only, that is, flat pressed single layer. Based on the properties and formaldehyde emission values, these boards shall be further classified in two grades and then in two classes as given in Table 1.
<table><tr><td>Type</td><td>Grade</td><td>Formaldehyde class</td></tr><tr><td rowspan="2">Flat pressed single Layer MDF board</td><td>Grade I</td><td>Formaldehyde Class, E_1 Formaldehyde Class, E_2</td></tr><tr><td>Grade II</td><td>Formaldehyde Class, E_1 Formaldehyde Class, E_2</td></tr></table></td><td colspan="3">4.1 MDF boards shall be classified according to Table 1.

4.2 Formaldehyde Classes In terms of formaldehyde class, each grade of MDF boards shall be further classified in two classes as follows:
a) Formaldehyde Class, E_1; and
b) Formaldehyde Class, E_2.</td></tr>
<tr><td>Dimensions</td><td colspan="2">The dimensions of plywood shall be as follows:</td><td colspan="2">When tested in accordance with IS 2380 (Part 2), the dimensions of MDF board shall be as follows:</td><td colspan="3">Any dimensions (length and width) as agreed to between the manufacturer and the purchaser may be used and shall be declared by the manufacturer. The dimensions shall be measured as per IS 2380 (Part 2). Prevailing dimensions (length × width) of MDF boards are as given below:</td></tr>
<tr><td></td><td>Length- The length of plywood shall be (m)</td><td>5.49, 4.89, 3.66, 3.05, 2.44, 1.83, 1.22</td><td>Length</td><td>5.49, 4.89, 3.66, 3.05, 2.44, 1.83 and 1.22 m.</td><td>Length, mm</td><td>5490, 4880, 3660, 3050, 2745, 2440,</td><td>2135, 1830, 1525, 1220, 1000 915</td></tr>
<tr><td></td><td>Width</td><td>The width of plywood shall be 1.22 m.</td><td>Width</td><td>1.22 m</td><td>Width, mm</td><td>1830, 1525, 1220,</td><td>1000, 915, 610 and 305</td></tr>
<tr><td></td><td colspan="2">The thickness of plywood shall be 6, 9, 12, 15, 18, 22, 25, 30, 35 and 40 mm.</td><td colspan="2">Thickness: 2.5, 4, 6, 9, 12, 15, 18, 22, 25, 30, 35, 40 and 45 mm.</td><td colspan="2">The thickness of the MDF boards shall be 2.5 mm, 4 mm, 6 mm, 9 mm, 12 mm, 15 mm, 18 mm, 22 mm, 25 mm, 30 mm, 35 mm, 40 mm and 45 mm.
NOTE - Any other thickness as agreed to between the manufacturer and the purchaser may also be used.</td></tr>
<tr><td>Dimensional Tolerance</td><td colspan="2">Tolerances on the nominal dimensions of finished boards shall be as follows:</td><td colspan="2">Tolerances on the nominal dimensions of finished boards shall be as given in Table 2.</td><td colspan="2">The tolerances on the dimensions of finished MDF boards shall be as given in Table 2.</td></tr>
<tr><td></td><td>Dimension</td><td>Tolerance</td><td>Dimension</td><td>Tolerance</td><td>Dimension</td><td>Tolerance</td></tr>
<tr><td></td><td>a) Length</td><td>± 3 mm/m</td><td>a) Length</td><td>± 3 mm/m</td><td>a) Length</td><td>± 5 mm/m</td></tr>
</table>

	b) Width	± 3 mm/m	b) Width	± 3 mm/m	b) Width	± 5 mm/m
	c) Thickness	± 0.3 mm	c) Thickness	± 0.3 mm	c) Thickness	± 0.3 mm
	d) Squareness	2 mm/m	d)Squareness, *Max*	2 mm/m	d)Squareness, *Max*	2 mm/m or 0.2 percent
	e) Edge straightness	2 mm/m	e) Edge straightness, *Max*	2 mm/m	e) Edge straightness, *Max*	2 mm/m or 0.2 percent
Requirement of modulus of elasticity	**Test for Modulus of Elasticity and Modulus of Rupture** The average and minimum individual value of modulus of elasticity and modulus of rupture as prescribed in 10.2.1 (e), when tested in accordance with IS 2380 (Part 4) shall not be less than the value specified in Table 1 (see 9)		The MDF boards shall conform to the requirements given in Table 3 and Table 4.		The MDF boards shall conform to the requirements given in Table 3 to Table 8, as per the respective grades.	
Marking Clause	Each fibre board shall be legibly marked near any of its comers with the following: a) Name of the manufacturer. b) Grade of fibre board (see 4 and Table I) c) Nominal dimensions (length, width and thickness. d) Date of manufacture, and e) The criteria for which the MDF has been labelled as ECO-Mark.		Each MDF board shall be legibly and indelibly marked with the following particulars: a) Manufacturer's name and his initials or his recognized trademark, if any b) Grade and formaldehyde class of MDF board (see 4 and Table 1) c) Nominal dimensions (length, width and thickness) d) Batch number e) Date of manufacture; and f) The criteria for which the MDF board has been labelled as ECO-Mark (in case the board has been marked with ECO-Mark) (see Foreword).		Each MDF board shall be legibly and indelibly marked with the following particulars: a) Manufacturer's name and recognized trademark, if any; initials or b) Grade and formaldehyde class of MDF board. c) Nominal dimensions (length, width and thickness). d) Batch number. and e) Date of manufacture.	

Table 1 (IS 12406: 2025)- Classification of Medium Density Fibre (MDF) Board

Table 1 Classification of Medium Density Fibre (MDF) Board

(*Clause* 4.1)

Sl No.	Grade	Service Conditions	Typical Examples of Applications (*See Note*)
(1)	(2)	(3)	(4)
i)	Regular (REG) grade	Dry conditions arid/semi-arid/ temperate	DIY uses, general uses, carcass, furniture, cabinets, substrate for any decorative finish
ii)	Moisture resistance (MR) grade	Humid conditions subtropical and tropical dry	DIY uses, general uses, overlay floors, carcass, furniture, cabinets for kitchen and bathroom, substrate for any decorative finish.
iii)	High moisture resistance (HMR) grade General purpose (GP) grade Furniture purpose (FN) grade	High humid conditions tropical wet	General uses, overlay floors, carcase, furniture, cabinets for kitchen and bathroom, window joinery, substrate for any decorative finish.

NOTE — The examples given for different applications of MDF boards are typical. MDF boards may be used for other similar applications, depending on the grade and service conditions as agreed between the manufacturer and purchaser.

Table 1 (IS 12406: 2003) Physical and Mechanical Requirements of Medium Density Fibre Boards

Sl. No.	Properties	Grade II (SBG II)	Grade I (SBG I)
vii	Modulus of rupture		
	a) Up to 20 mm thickness		
	Average	28	28
	Minimum individual	25	25
	b) Above 20 mm thickness		
	Average	25	25
	Minimum individual	22	22
viii	Modulus of Elasticity		
	a) Up to 20 mm thickness		
	Average	2800	2800
	Minimum individual	2500	2500
	b) Above 20 mm thickness		
	Average	2500	2500
	Minimum individual	2300	2300

Table 3 (IS 12406: 2021) MOE and MOR of MDF Boards- Grade I

Table 3 Physical, Mechanical and Other Requirements of MDF Boards – Grade 1

(*Clauses* 5.2, 9 *and* 10.2.2)

Sl No.	Properties	Requirements									Method of Test, Ref to
		Thickness mm									
		≤ 2.5	> 2.5 to 4.0	> 4.0 to 6.0	> 6.0 to 9.0	> 9.0 to 12.0	> 12.0 to 19.0	> 19 to 30.0	> 30 to 45.0	> 45.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
viii)	Modulus of rupture, N/mm², *Min*										
	a) Average	27	27	27	27	26	24	22	17	15	IS 2380 (Part 4)
	b) Individual	24	24	24	24	23	21.5	19.5	15	13.5	
ix)	Modulus of elasticity, N/mm², *Min*										
	a) Average	2 800	2 800	2 700	2 700	2 500	2 400	2 300	2 100	1 900	
	b) Individual	2 500	2 500	2 400	2 400	2 300	2 100	2 000	1 900	1 700	

Table 4 (IS 12406: 2021) MOE and MOR of MDF Boards- Grade II

Table 4 Physical, Mechanical and Other Requirements of MDF Boards – Grade 2

(*Clauses* 5.2, 9 *and* 10.2.2)

Sl No.	Properties	Requirements									Method of Test, Ref to
		Thickness mm									
		≤ 2.5	> 2.5 to 4.0	> 4.0 to 6.0	> 6.0 to 9.0	> 9.0 to 12.0	> 12.0 to 19.0	> 19 to 30.0	> 30 to 45.0	> 45.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
vii)	Modulus of rupture, N/mm², *Min*										
	a) Average	23	23	23	23	22	20	18	17	15	IS 2380 (Part 4)
	b) Individual	20.5	20.5	20.5	20.5	19.5	18	16	15	13	
viii)	Modulus of elasticity, N/mm², *Min*										
	a) Average	2 800	2 800	2 700	2 700	2 500	2 200	2 100	1 900	1 700	
	b) Individual	2 500	2 500	2 400	2 400	2 250	1 950	1 900	1 700	1 500	

Table 4 (IS 12406: 2025) MOE and MOR of Regular (REG) Grade MDF Board

Table 4 Requirements for Regular (REG) Grade MDF Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 2.5	> 2.5 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 9.0	> 9.0 to ≤ 12.0	> 12.0 to ≤ 19.0	> 19.0 to ≤ 30.0	> 30.0 to ≤ 45.0	> 45.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	23	23	23	23	22	20	18	17	15	IS 2380 (Part 4)
ii)	Modulus of elasticity (MoE), N/mm², *Min*	2 700	2 700	2 700	2 700	2 500	2 200	2 100	1 900	1 700	

Table 5 (IS 12406: 2025) MOE and MOR of Moisture Resistance (MR) Grade MDF Board

Table 5 Requirements for Moisture Resistance (MR) Grade MDF Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 2.5	> 2.5 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 9.0	> 9.0 to ≤ 12.0	> 12.0 to ≤ 19.0	> 19.0 to ≤ 30.0	> 30.0 to ≤ 45.0	> 45.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	27	27	27	27	26	24	22	17	15	IS 2380 (Part 4)
ii)	Modulus of elasticity (MoE) , N/mm², *Min*	2 700	2 700	2 700	2 700	2 500	2 400	2 300	2 200	2 000	

Table 6 (IS 12406: 2025) MOE and MOR of Moisture Resistance General Purpose (HMR-GP) Grade MDF Board

Table 6 Requirements for High Moisture Resistance General Purpose (HMR-GP) Grade MDF Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 2.5	> 2.5 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 9.0	> 9.0 to ≤ 12.0	> 12.0 to ≤ 19.0	> 19.0 to ≤ 30.0	> 30.0 to ≤ 45.0	> 45.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	28	28	27	27	26	24	23	21	19	IS 2380 (Part 4)
ii)	Modulus of elasticity (MoE), N/mm², *Min*	2 800	2 800	2 700	2 700	2 500	2 400	2 300	2 000	1 900	

Table 7 (IS 12406: 2025) MOE and MOR of Moisture Resistance Furniture (HMR-FN) Grade MDF Board

Table 7 Requirements for High Moisture Resistance Furniture (HMR-FN) Grade MDF Board

(*Clause* 9.1)

Sl No.	Properties	Requirements (Average) Nominal Thickness (mm)									Method of Test, Ref to
		≤ 2.5	> 2.5 to ≤ 4.0	> 4.0 to ≤ 6.0	> 6.0 to ≤ 9.0	> 9.0 to ≤ 12.0	> 12.0 to ≤ 19.0	> 19.0 to ≤ 30.0	> 30.0 to ≤ 45.0	> 45.0	
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
i)	Modulus of rupture (MoR), N/mm², *Min*	34	32	30	30	28	26	23	21	20	IS 2380 (Part 4)
ii)	Modulus of elasticity (MoE) , N/mm², *Min*	2 800	2 700	2 600	2 500	2 400	2 400	1 800	1 800	1 700	

Conclusion

The evolution of standards for particle board and MDF in India reflects the industry's response to changing technologies, international practices, and environmental considerations. From the early focus on basic dimensional and strength properties to today's emphasis on formaldehyde emissions, durability in varied climates, and alignment with ISO standards, the journey highlights India's efforts to ensure safe, reliable, and globally competitive wood-based panels.

With the 2025 revisions, Indian standards for particle boards and MDF not only enhance product quality and consumer safety but also position the country to align more closely with global markets. By integrating environmental considerations, formaldehyde regulations, and performance-based classifications, these revisions support the twin goals of sustainability and international competitiveness in the Indian panel industry.❑

FIPPI's Proposal for Incorporation of Uniform Colour-Coding for MDF Grades in Product Manual of IS 12406

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

1005, VIKRANT TOWER, 4, RAJENDRA PLACE, NEW DELHI110 008, INDIA
Phone No.: +91-11-2575 5649 • **E-mail:** fippi@fippi.org • **Website:** www.fippi.org

Chief Patron	Patrons	President	Senior Vice President	Vice Presidents	Director General
Mr. Sajjan Bhajanka	Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	Mr. Rajesh Mittal	Mr. Jaydeep Chitlangia	Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Dr. M.P. Singh

FIPPI/16/3-5/2025 September 3, 2025

To,

Ms. Madhurima Madhav
Scientist-E & Head CMD - III
Bureau of Indian Standards
Manak Bhawan,
9, Bahadur Shah Zafar Marg,
New Delhi-110 002.

Subject: Preventing Misuse of Green Colour used in MDF Boards through Clear Colour- Coding under Product Manual of IS 12406.

Respected Ma'am,

We extend our appreciation to BIS for revising IS 12406: 2025- Medium Density Fibre Boards of Wood and Other Lignocellulosic Materials for General Purpose — Specification, wherein three distinct grades—Regular Grade, MR Grade, and HMR Grade have been introduced based on uses and service conditions to ensure better quality differentiation and consumer safety.

As per prevailing practice, manufacturers have used green colour as the standard identifier for High Moisture-Resistant (HMR) Grade MDF. This simple visual cue enables easy distinction from Regular MDF (brown) and Fire-Retardant MDF (often red), thereby assisting both dealers and end consumers in proper selection. While this convention has served the industry well for differentiation, it has unfortunately become a tool for malpractice.

It has been observed that several unorganized manufacturers continue to mislead consumers by adding green or red dyes to ordinary MDF and marketing them as High Moisture-Resistant (HMR) or Fire-Retardant (FR) MDF boards. This malpractice persists because current marking and packaging rules are easily copied, leaving customers vulnerable and undermining the credibility of BIS standards. Unscrupulous operators exploit these loopholes, making it extremely difficult for end-users, traders, and even enforcement authorities to distinguish between genuine BIS-certified products and counterfeit ones.

We respectfully submit that this issue requires urgent control, particularly after the publication of the revised IS 12406 standard. Unless addressed now, the misuse of green-coloured ordinary MDF sold as HMR grade in the marketplace will continue to mislead consumers, weaken compliance, and unfairly disadvantage genuine manufacturers.

In the larger interest of industry compliance and consumer safety, the Federation of Indian Plywood & Panel Industry (FIPPI) proposes that a clause be introduced in the Product Manual of IS 12406 designating uniform colours for MDF grades for easy identification and monitoring:

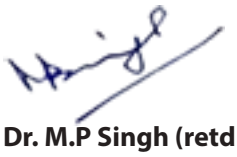
- **Regular Grade MDF –** Natural Wood Brown
- **Moisture-Resistant (MR) Grade MDF –** Pink
- **High Moisture-Resistant (HMR) Grade MDF –** Green
- **Fire-Retardant (FR) MDF –** Violet

Explicit incorporation of this clause in the Product Manual will provide legal backing for enforcement, ensuring that any misuse can be treated as a violation of license conditions under BIS rules.

We strongly believe that adoption of these measures will create a robust safeguard mechanism that addresses current loopholes, restores consumer confidence, and strengthens the overall credibility of BIS-certified MDF products in the Indian marketplace.

We request BIS to kindly incorporate this clause in the product manual and strengthen enforcement mechanisms accordingly.

Thanking you,



Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

Copy to: -

Shri Dwaipayan Bhadra
Scientist 'E' & Head (Civil Engg) Civil Engineering Department,
Bureau of Indian Standards,
New Delhi

Dr. Shakthi Singh Chauhan
Director
Institute of Wood Science & Technology
Bangalore.

FIPPI's Submission on Transfer of Wooden Flush Doors (IS 2202 & IS 2191) to CED 20

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

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Phone No.: +91-11-2575 5649 • **E-mail:** fippi@fippi.org • **Website:** www.fippi.org

Chief Patron	Patrons	President	Senior Vice President	Vice Presidents	Director General
Mr. Sajjan Bhajanka	Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	Mr. Rajesh Mittal	Mr. Jaydeep Chitlangia	Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Dr. M.P. Singh

FIPPI/16/3-2025 July 21, 2025

To,
The Director General
Bureau of Indian Standards (BIS)
Manak Bhawan, New Delhi.

Subject: Request for Transfer of Wooden Flush Doors (IS 2202 Part 1 & 2) & 2191 Part 1 & 2 from CED 11 to CED 20.

Respected Sir,

On behalf of the Federation of Indian Plywood and Panel Industry (FIPPI), we respectfully submit a request to transfer the subject of wooden flush doors, currently under the purview of CED 11, to CED 20, which already oversees the majority of wood-based and lignocellulosic composite products.

We submit this request in view of the following facts:

1. **Technical Alignment:** CED 20 consists of experts, manufacturers, and research institutions with specialized knowledge in wood and lignocellulosic materials. Shifting this subject to CED 20 will facilitate more relevant, technically sound, and industry-aligned standards development.
2. **Harmonization of Standards:** Consolidating wood-based product standards under a single committee will help avoid overlaps, reduce fragmentation, and promote consistency in review and formulation processes.
3. **Industry Representation:** CED 20 has strong representation from key stakeholders in the wood and panel industry, including SMEs and micro-enterprises, many of whom are engaged in the manufacturing of wooden flush doors. This will ensure their concerns and perspectives are adequately reflected in the standardization process.

It is pertinent to mention that this request was also raised by Dr.C.N. Pandey, Principal Technical Advisor to FIPPI, during the last meeting of the Civil Engineering Division Council (CEDC). He emphasized that many micro and small enterprises (MSEs), who constitute most manufacturers of this product, are currently underrepresented in CED 11, and their interests would be better served under CED 20. Resultantly there are many representations from MSMEs especially from Gujrat, Uttarakhand, Haryana and Kerala stating that their product category as per market demand is not included in the present standard with imminent threat of closing their enterprises in view of Quality Control Orders enforceable from 28th August.

We sincerely hope that this request will be given due consideration in the interest of improving standard development and ensuring inclusive industry participation.

Thank you for your attention and support.

Yours sincerely,

Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

FIPPI Urges BIS to Amend Standards for Greater Flexibility in Door Thickness

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY
REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969
1005, VIKRANT TOWER, 4, RAJENDRA PLACE, NEW DELHI110 008, INDIA
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FIPPI/16/3-6-2025 September 15, 2025

To,

Shri Dwaipayan Bhadra
Director & Head
Civil Engineering Department (CED)
Bureau of Indian Standards (BIS)
Manak Bhawan, New Delhi

Subject: Request for Incorporation of Provision for Additional Door Thicknesses in BIS Standards and Product Manuals.

Dear Sir,

On behalf of the Federation of Indian Plywood & Panel Industry (FIPPI), we wish to draw your kind attention to a matter of practical concern being faced by door manufacturers in relation to BIS certification under IS 2202 (Part 2), IS 2191 (Part 1), and IS 2191 (Part 2).

At present, the product manuals for the above standards restrict licensing to door thicknesses of 25 mm, 30 mm, and 35 mm. However, in actual practice, manufacturers are often required to produce intermediate thicknesses such as 26 mm, 28 mm, 31 mm, 32 mm, 33 mm, and 34 mm to meet diverse customer requirements. These products, when tested, fully conform to the prescribed performance and safety parameters of the applicable BIS standards.

Despite such compliance, certification for these intermediate thicknesses is currently not being granted, as they are not specifically mentioned in the product manuals. This has created operational challenges for manufacturers and has limited the flexibility that the standards are otherwise intended to provide.

To address this concern, we earnestly request that BIS kindly consider the following:

1. **Amendment of standards/product manuals** (IS 2202 Part 2, IS 2191 Part 1, and IS 2191 Part 2) to include a general provision such as: "Any other thickness as agreed to between the manufacturer and the purchaser may also be included." (This approach has also been adopted in other BIS product standards.)
2. **Issuance of a clarification notification in the interim,** permitting certification for all thicknesses within the 25 mm–35 mm range, subject to compliance with the performance requirements of the respective standards.
3. In view of current market trends and increasing customer demand for customized door dimensions, the following amendment to our standard Flush Door specifications:
   - **Maximum Height:** Up to 10 feet
   - **Maximum Width:** Up to 4 feet

- **Thickness:** As per customer requirement (60mm +)

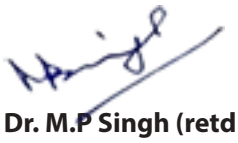
This change reflects the growing preference for varied door sizes, driven by the availability of modern hardware and evolving design aesthetics. Customers are increasingly requesting doors in non-standard dimensions to suit specific architectural needs. Accordingly, we request updating BIS specifications to accommodate this flexibility in production.

4. Flush Door of any thickness shall be tested to cover the entire range of thickness. To streamline the licensing process for flush doors and reduce manufacturing and transportation costs, the following proposal is submitted for consideration:
    - **Testing Coverage:** Samples submitted for license issuance should represent the full range of thicknesses manufactured.
    - **Dimensional Flexibility:** In place of larger and thicker variants, samples with lower thickness and smaller dimensions may be accepted, provided they are produced using the same materials and manufacturing processes as per BIS
    - **Cost Efficiency:** This approach will help minimize production and logistical expenses without compromising the integrity of testing or product quality.
    - **Regulatory Compliance:** All flush doors, regardless of size or thickness, shall continue to be manufactured strictly in accordance with applicable BIS norms.

Such a modification will not only bring the standards in line with practical manufacturing realities but will also prevent unnecessary hardship to compliant manufacturers. Most importantly, it will ensure that customer-specific requirements can be met effectively without compromising on quality or safety.

We sincerely request your urgent intervention in this matter and remain hopeful of a favorable consideration.

Yours faithfully,



Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

Greenpanel Industries Sustainability Through Science – Redefining India's Wood Panel Industry

Shiv Prakash Mittal
Founder & Executive Chairman
Greenpanel Industries Limited

With more than 35 years of industry experience, Shri. Shiv Prakash Mittal, is an iconic figure in the Indian wood panelling industry with the distinction of creating some of the industry's most successful brands. Shri. Mittal has been instrumental in driving Greenpanel Industries Ltd. to where it is today. It is his vision and far-sightedness which has led the company to set-up plants across the length and breadth of the country and also expand overseas.

The Indian wood panel industry stands at a critical crossroads—balancing rising demand for engineered wood products with the urgent need to protect natural forests.

Greenpanel Industries Limited, as India's largest producer of Medium Density Fibreboard (MDF) and other engineered panel products, has chosen a path defined by scientific Agroforestry, low-impact manufacturing, and rigorous compliance with environmental norms.

This approach has positioned Greenpanel not only as a market leader, but as an industry model for sustainable growth.

Sustainable Raw Material – Science in the clonal propagation technology

At Greenpanel, the sustainability cycle begins in the nursery, not the factory.

We have invested in advanced clonal propagation technology to produce genetically superior, highyield, disease-resistant planting material for eucalyptus and poplar—species optimised for the fibre requirements of MDF manufacturing.

The Clonal Propagation Technique

- **Open Nursery Development:** Saplings mature under monitored field conditions to strengthen root architecture and stem growth.

- **Farmer Distribution:** High-quality saplings are distributed at subsidized rates along with a package of agroforestry technical know-how practices, spacing recommendations, and pest management protocols.

This science-driven agroforestry model ensures uniform log quality, reduces variability in fibre characteristics, and enhances the efficiency of downstream MDF production.

Agroforestry as an Economic and Ecological Engine

- **Economic Resilience –** Farmers gain a steady revenue stream without compromising food crop cycles.
- **Ecological Restoration –** Agroforestry plantations act as carbon sinks, improve soil structure, and restore degraded lands.

Independent assessments show that the carbon sequestration potential of eucalyptus plantations in our program offsets a significant portion of the emissions from panel manufacturing—demonstrating measurable progress toward a carbon-neutral value chain.

Manufacturing Excellence – Low Emission, High Efficiency

Our MDF manufacturing process integrates precision fibre engineering with environmental safeguards:

- **100% Timber Utilisation:** Log debarking, chipping, fibre refining, and panel pressing are configured to ensure no raw material is wasted residues are converted into biomass energy.
- **Refiner Steam Recovery:** Heat recovery systems capture and reuse process steam, lowering fuel consumption.
- **Emission-Controlled Resins:** Lowformaldehyde adhesives meeting E0, E1 and CARB Phase 2 norms reduce volatile organic compound (VOC) emissions, safeguarding indoor air quality in end-use applications.

- **Water Recycling Loops:** Closed-loop water circuits with chemical and biological treatment minimise freshwater draw.
- **Energy Optimisation:** In-house biomass boilers, fuelled by wood waste, cut reliance on fossil fuels. The result is a manufacturing ecosystem that meets stringent BIS Quality Control Orders (QCO) while aligning with global environmental performance benchmarks as per Greenpro norms.

MDF as a Sustainable Material Choice

From a technical perspective, MDF offers superior raw material efficiency compared to solid timber:

- **Higher Recovery Rates:** MDF production utilises small-diameter logs and wood residues that would otherwise be unsuitable for solid wood applications.
- **Dimensional Stability:** Uniform fibre distribution and engineered bonding reduce warping and swelling.
- **Design Flexibility:** Consistent density and machinability enable complex CNC routing and surface finishing without defects.

Replacing traditional solid wood with MDF made from renewable plantation timber significantly reduces pressure on natural hardwood forests—a priority in both national forest policy and climate action frameworks.

Compliance and Credibility

Greenpanel operates under a framework of verifiable certifications and regulatory compliance:

- **FSC® Chain of Custody Certification –** traceable responsible sourcing.
- **ISO 9001, ISO 14001, ISO 45001 –** integrated management for quality, environment, and occupational safety.
- **BIS QCO Compliance –** ensuring Indian Standard conformity for both MDF and plywood categories.
- **Greenpro, IGBC, CE, CARB P2 Certifications**

These certifications are not symbolic—they are audited, measurable, and enforceable standards that align our processes with the highest levels of environmental and technical governance.

A Model for the Industry and Policy

The Greenpanel model demonstrates that sustainable sourcing, farmer-inclusive agroforestry, and advanced manufacturing can coexist at scale. It offers a blueprint for:

- Reducing dependence on natural forests.
- Integrating rural economies into industrial supply chains.
- Meeting both domestic and export market compliance requirements.
- Achieving measurable environmental impact through forestry science.

As government agencies and industry bodies chart the future of India's panel sector, Greenpanel's operating framework stands as a reference point for sustainable industrialisation.

Greenpanel – Merging Technical Excellence with Ecological Responsibility.❑

FEDERATION OF INDIAN PLYWOOD AND PANEL INDUSTRY

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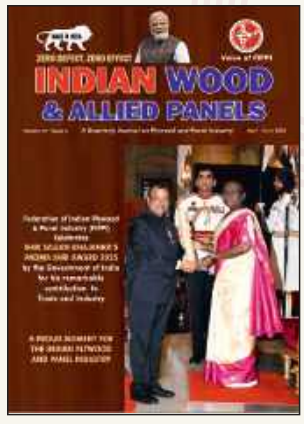

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Greenlam carves the road to a Green Future – Embarks on Self-Sustainability journey through TOF Augmentation Program – 'Vriksha Vriddhi©'

As Greenlam transforms from a standalone surface products provider to an integrated solutions provider, it has envisaged a long-term roadmap towards Raw Material Self-Sustainability. Embarking on this journey, Greenlam has launched 'Vriksha Vriddhi' - a strategic Agroforestry initiative to enhance tree cover, improve resource access and reduce exposure to a volatile resource environment. Starting industrial scale execution from FY-25, it grew its agroforestry footprint to 1800 acres focusing on marginal, waste, degraded and fallow tracts in vicinity of its plants.

Ashish Mishra
Vice President
Sustainable Wood Sourcing & Plantation
Greenlam Limited

Greenlam ranks among the top three laminate manufacturers globally and is a leading integrated substrate and surface solutions provider. The company offers a wide range of products to customers in over 120 countries, consistently delivering innovation and quality. Its diverse product portfolio includes decorative laminates & compacts, interior and exterior cladding, restroom cubicles and locker solutions, decorative veneers, engineered wood flooring, doors, plywood and pre-laminated chipboards.

Preamble

In realm of global Climate Change mitigation action, India has pledged for ambitious Nationally Determined Commitments (NDCs) including augmentation of Forest and Tree cover from 25% to 33% aiming to sequester additional 2.5 to 3 billion tons of CO_2 equivalent by 2030. For this, a major impetus will be through expanded coverage of Trees Outside Forests (TOFs) wherein the onus is being shared by responsible Corporates - especially Wood based Industries to promote Tree Plantations.

Even beyond Climate Change mitigation, the contemporary business models solicit long-term sustainability through myriad ESG initiatives and other risk mitigation measures. Today, the only way for Indian Wood Based Industry and especially for Indian Plywood and Panelboard Industry to thrive and grow viably is by striking a synergetic association with the ecosystem they operate in.

Greenlam's new chapter of transformation -

Three years ago, at Greenlam, we entered a new transformation chapter in our existence. This was poised to make us larger and broader; to generate economies of presence on the one hand and deeper derisking on the other; to enhance business visibility, responsibility, profitability and sustainability.

Since then, more change has transpired at Greenlam than in its previous existence. We have evolved from a single major product line to 6 revenue streams. We have extended our manufacturing presence from one zone to three zones. We have grown from 2 manufacturing locations to 5. We have transformed from a predominantly regional manufacturing to a pannational presence. We have strengthened our international infrastructure.

Alongside, over the last few years, Greenlam has created decisive building blocks that would eventually translate into long-term value creation through initiatives that would deepen its business sustainability.

Vision for long-term Self-Sustainability

While expanding and diversifying into Wood based substrate and value-added products, Greenlam envisioned long-term Self-Sustainability for raw material security and sustainable wood sourcing. Therefore, before commissioning its wood-based operations, Greenlam conducted baseline studies in target districts while undertaking multiple stake-holder consultations to evolve a prudent roadmap for Agroforestry & Farm Forestry Development in command areas.

Roadmap for Plantation Development – The Vriksha Vriddhi© Initiative

Greenlam laid the foundation in 2022-23 by evolving the Self-Sustainability roadmap – a blueprint for systematic, scientific and largescale Plantation Development Program in command areas of its wood-based operations.

In tune with the objectives of fostering Tree based augmentation coupled with farmer development and rural socio-economic growth, Greenlam christened its Plantation Promotion Program as – Vriksha Vriddhi© - a pan-India initiative to facilitate Plantation development through scientifically managed Farm and Agroforestry reinforced vide outreach, extension, education and delivery of top- Quality locally proven Clonal Planting Stock.

Myriad elements of program include inter alia –

1. Suitable Agroforestry and Farm Forestry models tailored for local needs and winwin outcome for Farmers and Industry.
2. Extensive promotion of Agroforestry through grass-root outreach, extension & training to farmers in command areas.
3. Direct and indirect production & supply of Hi-Quality Planting Stock as infeed.
4. Collaborations for R&D for evolving new Clones and alternate species for future.
5. Synergetic association with stake holders.
6. Facilitation for tech-enabled Traceability & Responsible Forestry and Credible Certifications.
7. Facilitate, develop and nurture efficient wood supply ecosystems.

Approach

Vriksha Vriddhi program design entails multiple aspects aptly intertwined to fetch holistic outcome for long term sustenance aiming to create integrated outputs through qualitative & quantitative augmentation of Wood resource while fostering a self-sustainable wood resource and supply chain ecosystem.

Greenlam has committed resources as per plan to fetch vital inputs for the program. These include a strong grassroot presence through locally deployed teams for rural outreach and Farmer education, Skilling, QPM Supply facilitation and Farmers' hand holding through all stages of Plantation establishment and development till production. The deployment is through proven 'Hub and Spoke' model with centralised processes including design & direction.

Greenlam Vriksha Vriddhi Program - Glimpses.

Farmer Outreach & Rural Extension Initiatives underway at field level.

Clonal QPM Delivery and Planting Support & Guidance.

Greenlam Vriksha Vriddhi – First Set Plantations – Few Glimpses.

Agroforestry at Greenlam - Building a sustainable wood ecosystem

Greenlam's agroforestry initiative supports its longterm sustainability vision by promoting a self-reliant, community integrated wood supply chain. This initiative ensures a sustainable wood supply for Greenlam's Tindivanam and Naidupeta plants while cutting transport emissions. It also aids carbon sequestration estimated at 0.30–0.50 million tons of CO_2 annually and promotes water-efficient, multiproduct farming using high-yield clonal varieties.

Greenlam has commenced Phase-1 execution of Vriksha Vriddhi program from 2024-25 and it is envisaged to plant 10 – 20 million trees over FY 2025–28, focusing on coastal Andhra Pradesh and Tamil Nadu. Aligned with the retreating monsoon, planting is timed for higher sapling survival and optimal growth. Accordingly, required resources have been deployed to steer the execution. By March 2025, around 1.8 million trees have been planted covering over 1800 acres, to achieve the year's target for Tree Plantation.

Way forward

In India, integrated and long-term Plantation augmentation initiatives of colossal scales have been successfully implemented mainly in Pulp & Paper Industry. The initiatives, technology and models have witnessed more than three decades of evolution through numerous sets of successes and failures. With over three decades of close association with wood-based industry and given the cumulative experience of teams, Greenlam is well positioned to leverage Vriksha Vriddhi program experience and cross-sector success stories and learn from Global Best Practices.

Salient features of Greenlam's

Agroforestry initiative –

Integrated farming model:

Promoting Agroforestry and Mixed Farming through 'All-in-One Multi-Product Plantation Model', allowing farmers to grow trees with other crops enabling better landuse, faster & higher returns and lower input costs.

Farmer-centric approach:

Addressing key rural challenges such as land constraints, long gestation periods, labour shortages, and market uncertainties through customised plantation models.

Technology-enabled monitoring:

Deployment through a dedicated mobile app and geo-tagging system for real-time status, monitoring and tracking of plantations, farmer engagement and database ensuring traceability, transparency and efficiency.

Community engagement:

Local teams work closely with farmers, village heads and community influencers, ensuring high adoption rates through on ground training, support, and trust-building.

Centralised implementation:

The programme is centrally planned and uniformly executed across locations, with mechanisms to capture and replicate best practices and success stories.

Environmental impact:

Constructive utilization of waste, degraded and unproductive / fallow lands; Augmented Tree cover improves soil health and supports favourable microclimates and ecosystem services such as carbon sequestration.

Socioeconomic Development:

Strengthening rural economies and fostering local entrepreneurship through awareness, techadoption, extra income generation and building a self-sustaining wood supply ecosystems duly aligned with Greenlam's present and futuristic manufacturing needs.

While a strong foundation has been laid since 2022-23 and first industrial scale plantation augmentation coverage starting from 2024-25, Greenlam is all geared to execute the Phase-1 of Vriksha Vriddhi program over next few years.

Greenlam has also evolved a systematic Tech-based Program Review and Monitoring System to course correct the program periodically as also to document the journey of Tree Growers through Life Cycle of Tree Crop.❑

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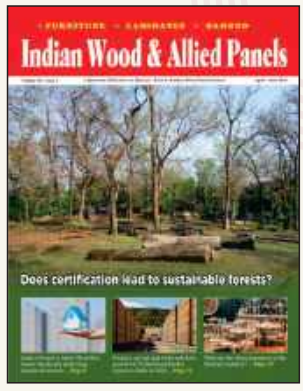

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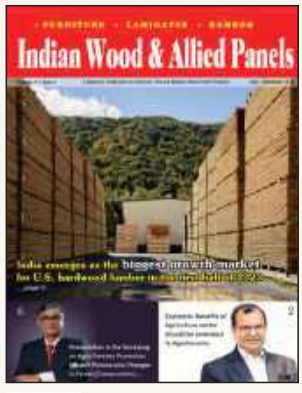

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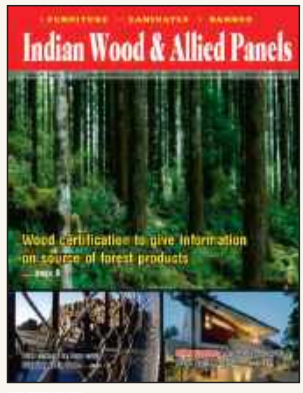

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Estimation of the wood consumption in Indian plywood industries



Shailendra Kumar[1] **Vinod Upadhyay[2]** **Rajiv Pandey[3]**

Abstract

With close ties to important industries like the furniture and construction sectors, the plywood industry is vital to the economy and development. With the contribution, present evaluation aims to estimate the volume of wood used in the Indian plywood manufacturing sector. A survey was conducted with the stakeholders, mainly the manufacturers with expert discussions with forest departments and leaders of industry associations in the panel sector to extract the information about the total production of the plywood in the industry. The bootstrapping technique was applied to estimate the average daily consumption of wood with 95% confidence interval. The 6.1% CAGR of the Indian plywood industry's growth was used to make the projection. The survey results that 3132 plywood production units was functioning in India with majorly (80%) small - scale units. The remaining units are classified as medium - and large - scale units. The results estimated that country's plywood industry consumed wood at a minimum of 0.18 million cubic meters (M CUM) and at a high of 0.28 M CUM daily with the total annual volume of wood in the industry was around 70.49 M CUM with a range of 54.89 M CUM to 85.62 M CUM in 2024. In 2029, the combined estimated wood consumption across all industries is projected to be 94.77 M CUM, with a range of 62.23 to 97.06 M CUM.

Keywords: *Composite wood, plywood manufacturing units, wood industry, wood production, tree outside forests, raw material supply.*

Introduction

Plywood is an engineered wood product made from veneers, resins, and additives. Veneers are required in plywood for top faces for aesthetically appealing termed as face veneers and core veneers. Wood logs are used for veneering, which involves debarking, drying, sorting, and graded. Glue is then applied to the veneers, and hot pressing is done to ensure grain directions are perpendicular. Resizing, trimming, and finishing are made according to the plywood's requirements. Production of plywood mainly for tea chests is started in India began in 1905 as a replacement for sawn wood tea chests. The first plywood factory was established in 1918, followed by others in 1924 and 1937. During the period, plywood was imported worth Rs. 2.3 million in 1906 from Finland, Sweden, and Japan. By World War II, only three factories produced plywood and produced around 3 million tea chests. Other factories were established later, and several small and medium-sized mills were established across the country.

Currently, one of the world's largest producers and consumers of wood products, India mostly uses wood for plywood and other wood-based industries as well as for construction industries (Quinonez Montiel, 2016, Pandey and Roy, 2020). Targeting niche markets in Europe, the USA, Canada, and Australia, India is a major exporter of wood products, such as furniture, handicrafts, and wooden toys. Furthermore, the nation exports plywood worth more than USD 200 million a year, to the Middle East, Africa, the US, and Europe being its top destinations (Bansal, 2021). The Indian plywood industry is expected to increase at a compound annual growth rate (CAGR) of 6.74% from FY 2023-24 to FY 2028-29, from its current size of Rs 208.5 billion in FY 2022-23 to Rs 306.5 billion by FY

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2028-29 (IMARC, 2023). Since 2000, India has accounted for around 6% (1.3 M CUM) of the world's production of tropical hardwood plywood, placing it fourth in the world along with China, Malaysia, and Indonesia. India's output increased to almost 13% (2.4 M CUM) by 2014, giving it a combined 87% (16.5 M CUM) share with the other top nations (Montiel, 2016). Since 2006, India has been one of the top three consumers of tropical hardwood plywood, after China and Japan. In 2014, its share increased to 14% (2.4 M CUM), with China and Japan holding a combined 62% share. Over the period of two years, India's plywood exports increased from USD 30.69 million to USD 33.46 million, while its imports increased from USD 97.80 million in 2017 to USD 107.63 million by 2019 (REFF). The plywood industry, which has a 60% market share and is valued at around INR 28,000 crore (about USD 3.8 billion), is expected to increase by 10% to 12% annually, with a historical growth rate of 6% to 7% (REFF).

An in-depth knowledge of the plywood industry is essential for assessing the supply and demand for timber in a country for various reasons. In addition to assisting economic planning by directing investments, infrastructure development, and trade policy, precise estimates will assist government policies on land use, rural development, and forest protection. Additionally, by lowering price volatility and guaranteeing a steady supply of wood goods, an understanding of supply and demand dynamics stabilizes the market leading to reduce trade gap. For strategic planning and long-term growth, it is crucial to comprehend the demand for timber throughout the different segments of the Indian panel industry. By examining the demand for timber in India for the production of plywood, this paper seeks to offer insightful information to stakeholders, policymakers, and industry. The study aims to estimate the number of plywood manufacturing units in India and the total wood volume consumed by the plywood sector across the country.

Materials and Methods

Estimation of the number of plywood units in the country

The country was divided into four zone (Table 1) for data collection on the number of plywood manufacturing units, average daily wood consumption and species. A questionnaire containing the following information was developed, tested and used to collect the data through email, phone, and visiting the units.

i. Quantity of round wood consumed daily in the units (in weight or volume).

ii. Number of working days on annual basis in the plywood units.

Table 1: Zones of India and the states.

Zone	State / UT
North India	Uttarakhand, Delhi NCR, Uttar Pradesh, Rajasthan, Panjab, Haryana, Himachal Pradesh and Jammu and Kashmir.
West and Central India	Maharashtra, Goa, Gujarat, Dadra and Nagar Haveli and Daman and Diu.
South India	Tamil Nadu, Puducherry, Andhra Pradesh, Kerala, Lakshadweep, Karnataka and Telangana.
East India	West Bengal, Andaman and Nicobar Islands, Odisha, Chhattisgarh, Jharkhand, Bihar, Northeastern State.

Estimation of the amount of wood used in the plywood units

Estimation was made by using the conversion of weight and volume of the round wood using a conversion factor derived as 1-ton weight of wood is equivalent to 1.115 CUM based on the tree species (FAO, ITTO and UN, 2020).

$$1\ \text{Ton Weight} = \frac{\text{Green Weight (kg)}}{\text{Green Volume (m}^3\text{)}} = \frac{1115\ \text{kg}}{\text{m}^3} = \frac{1.115\ \text{T}}{\text{m}^3}$$

Statistical data Analysis

Following steps were adopted for the estimation of consumption of wood plywood industries across India as:

Step 1:	Data collection on daily wood consumption.
Step 2:	Application of bootstrapping method to estimate the daily wood consumption.
Step 3:	Estimation of quartile to adjudge the potential outlier in the daily consumption.
Step 4:	Dividing the plywood units into small and medium industries based on estimated mean value of daily consumption of wood.
Step 5:	Using potential outliers in the data as the third category of units (large industries).
Step 6:	Performing bootstrapping on each category of the industry for estimation of mean with 95% confidence interval.
Step 7:	Estimates of daily consumption for all the three categories of units were utilized to estimate annual wood consumption in plywood industries across India.

Detailed procedure is being mentioned below:

Bootstrapping Procedure

Bootstrapping technique was applied to estimate

mean and variance. Through random drawing with replacement from the original data set, the resampling technique known as "bootstrapping" enabled to draw a large number of simulated samples. This method was used independently for the Small, Medium, and Large industries, with 1000 resampled datasets for estimating summary statistics including mean, standard error, and confidence intervals. Detailed explanation is as follows:

a. Resampling:

For each industry type, perform the following steps:

1. **Bootstrap Samples:** Random sample with replacement from the dataset of the industry for each category.
2. **Compute Estimates:** Calculation of the statistic (e.g., mean, median, standard deviation) for each bootstrap sample.
3. **Repeat:** Repeat the above two steps for typically 1,000 to generate a distribution of the bootstrap estimates.

b. Estimation of Statistic: The estimate of the parameter of interest (e.g., mean) is the average of the bootstrap estimates.

c. Confidence Intervals: For each bootstrap estimate, the percentiles was calculated to determine the confidence interval i.e. for a 95% CI of the bootstrap estimates.

Quartile method to identify outliers

We employed the quartile method for the analysis of industry data, for locating the outliers. We estimated value of of the data set for estimation of the IQR, the middle 50% of the data. The IQR was estimated based on estimates of first quartile Q1 and the third quartile (Q3) to establish threshold values for outliers. Data vales below Q1 - 1.5*IQR and above Q3 + 1.5*IQR, were considered outliers. These steps above have enabled us to identify the abnormal low or high points that were very far away from the general range of observations, allowing a more accurate analysis that caters to these outlier values. Detailed steps were as follows:

Step-1:	Quartiles calculation: Calculate the first quartile (Q1), second quartile the median (Q2), and third quartile (Q3) for the dataset.
Step-2:	Interquartile Range (IQR) computation: Compute the IQR as IQR=Q3−Q1
Step-3:	Outlier Detection: For this purpose, outlier threshold is estimated as follows

Lower Bound: Q1−1.5×IQR
Upper Bound: Q3+1.5×IQR

Any data points below the lower bound or above the upper bound are considered outliers.

Results and Discussion

The survey results indicate around 3231 numbers of plywood units was functional across India. The distribution of the plywood units was concentrated to states of Haryana, Punjab and Uttar Pradesh in north India, and in Kerala, Karnataka and Telangana in southern India (Fig 1).

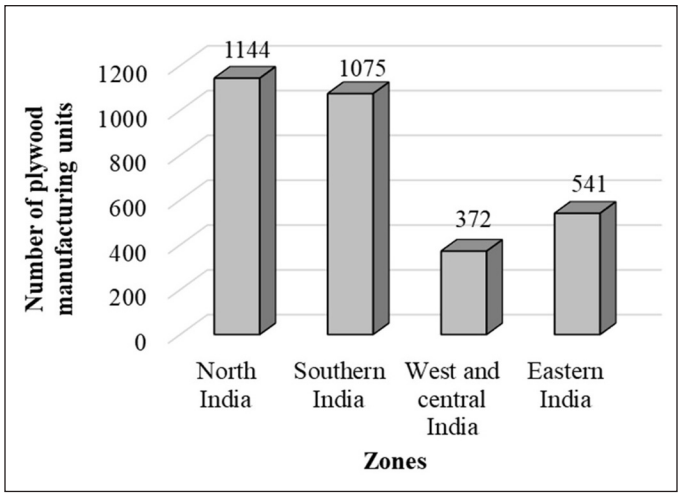

Figure 1: *Zone-wise distribution of plywood manufacturing units in India.*

North zone has 1144 number of the plywood units while that with south zone had 1015. Thus, north (37%) and south (34%) zones constituted a total 71% of the plywood manufacturing units in India. Eastern parts of the country had 17% of the manufacturing units, whereas, central and west zone had 12% of the manufacturing units. However, the survey results that out of the all plywood manufacturing units, small units constituted roughly 80% and remaining were medium and large. In 2023, number of plywood manufacturing units in China was approximately 7,400 (Anonymous, 2023).

Mean daily wood consumption in plywood manufacturing units

Mean daily wood consumption and 95 % confidence interval values for daily consumption of different categories of plywood Industry across India was estimated (Table 2). Mean daily wood consumption by small industries (2506 number i.e. 80% of total) was 405.82 x 102 kg (40.5 tonnes) ranging from 299.51 x 102 kg to 510.33 x 102 kg. Medium sized plywood manufacturing units (600 number i.e. 19.16% of total) had mean daily wood consumption as 1660 x 102 kg (166 tonnes) with range from 1380 x 102 kg to 1940 x 102 kg. Large plywood manufacturing units were 26 (0.83% of total), which had daily wood consumption of 3633.33 x 102 kg (363.3 tonnes) ranging from 2400 x 102 kg to 4500 x 102 kg (Table 2 and Fig 2).

Table 2: Size of the plywood Industries along with estimated daily wood consumption per Industry across India.

Category of Industry	Number of Industries	Industries Proportion (%)	Daily Consumption (kg x100) [Mean (95 % CI)*]
Small	2506	80.01	405.82 (299.51, 510.33)
Medium	600	19.16	1660 (1380, 1940)
Large	26	0.83	3633.33 (2400, 4500)

**based on bootstrapping; In non-symmetric distribution 'Mean - 95% CI' the lower value may not be equal to 'Mean + 95% CI' upper value.*

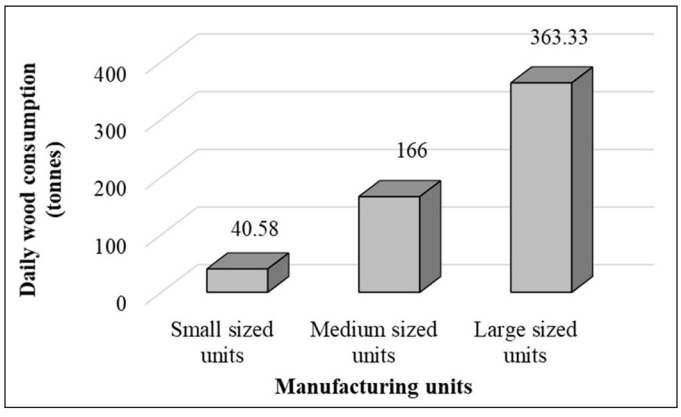

***Figure 2:** Daily wood consumption by plywood manufacturing units.*

Daily wood consumption in 80% of the manufacturing units (small sized) was approximately four times lower than that of medium sized industry and approximately ten times that of large sized manufacturing units. The daily wood consumption of wood in plywood industries across India was found to be ranging from 0.18 million cubic meter (M CUM) to 0.28 M CUM with mean of 0.23 M CUM (Table 3).

Table 3: Estimated daily wood consumption in different categories of industries across India.

Category of Industry	Daily Wood Consumption	
	Weight (x 100)	Volume (in CUM)
Small	1016984.92 (750572.06, 1278886.98)	113393.82 (83688.78, 142595.89)
Medium	996000 (828000, 1164000)	111054 (92322, 109416)
Large	94466.58 (62400, 117000)	10533.03 (5865.6, 129786)
Total	**2107451.5 (1640972.06, 2559886.98)**	**234980.84 (182968.38, 285427.39)**

**1 tonne wood=1.115 CUM; Values are Mean (Lower bound, Upper bound).*

After generalizing the result to annual production (300 working days in a year), the total wood volume consumption in plywood Industry across India were 54.89 to 85.62 M CUM with the mean value of 70.49 M CUM (Table 4).

Table 4: Total estimated annual wood consumption in different categories of industries across India during year 2024.

Type of Industry	Annual wood Consumption	
	Weight (in Qtl.)	Volume (in M CUM)
Small	305095476 (225171618, 383666094)	34.02 (25.11, 42.77)
Medium	298800000 (248400000, 349200000)	33.32 (27.69, 38.93)
Large	28339974 (18720000, 35100000)	3.16 (2.08, 3.91)
Total	**632235450 (492291618, 767966094)**	**70.49 (54.89, 85.62)**

**considered 300 working days in a year; Values are 'Mean (Lower bound, Upper bound)'.*

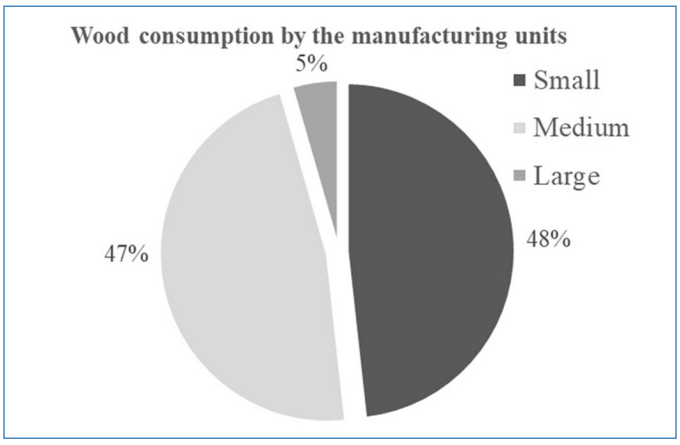

***Figure 3:** Proportion of the wood consumption by the categories of the plywood manufacturing units.*

The analysis results that around 95% of the wood raw material consumption was made by small and medium sized industries almost in equal proportion (47% and 48%). Share of the large size manufacturing units was very small (5%). In 2023, China's plywood production capacity

is approximately 205 M CUM (Anonymous, 2023). Around 2.16 M CUM RWE is required to produce 1.0 M CUM plywood (FAO, ITTO and UN, 2020). Moreover, considering the production capacity, the round wood equivalent of wood consumed will be 442.8 M CUM RWE assuming the production at full capacity in China. Assuming production at 70% capacity, 309.96 M CUM RWE is consumed by Chines plywood manufacturing units. Thus, total wood consumption in Chinese plywood manufacturing units and Indian plywood manufacturing units indicate that there is a huge (approximately 3 times) difference in the spectrum of plywood manufacturing in India than China. China is the largest producer and exporter of plywood in the world (EMR, 2024; IMARC, 2023). Moreover, in 2023, total plywood production in Malaysia is 4.37 M CUM (Anonymous, 2023), which is equivalent to 9.44 M CUM RWE wood. Indonesia, one of the biggest plywood exporters manufactured 4.06 M CUM plywood in 2022 (Siahaan, 2024), which is equivalent to 8.77 M CUM RWE wood. Thus, plywood production as well wood consumption capacity in India is much larger than that of Malaysia and Indonesia.

With multiple manufacturing facilities dispersed around the nation, India is also one among the world's top producers of plywood. The leading states that produce the most plywood are Gujarat, Kerala, Haryana, and Punjab. Century Plyboards, Greenlam Industries, Greenpanel Industries, Greenply Industries, and Stylam Industries are the main organized plywood industries. At the moment, branded goods from organized sectors are in a favourable position because of a discernible change in consumer behaviour, sophisticated demand, and contemporary preferences. Due to the increasing prices and limited availability of traditional wood species like teak and deodar, panel goods are becoming more and more popular (Youngquist, 1999).

Customers find plywood to be an appealing alternative to more expensive solid wood species due to its affordability (Castanie et al., 2023). Because of its excellent dimensional stability, stiffness, strength, durability, and adaptability, plywood is becoming more and more popular among consumers for structural and building applications.

Projection as per Compound Annual growth rate (CAGR) for year 2029

The need for affordable options like plywood is anticipated to continue to grow as more housing units are built under government assistance programs (Claight Corporation, 2022). For the projection purpose, compound annual growth rate (CAGR) was utilised as 6.1% (Allied Market Research, 2024) and results are reported for 2029 (Table 5).

Table 5: Projection of total wood volume consumption after by 2029.

Year	Volume (in M CUM RWE)
2024	70.49 (54.89, 85.62)
2029	94.77 (73.81, 115.12)

From the table 5 it is evident that annual wood consumption by the plywood manufacturing units in India will be around 100 M CUM by 2029. Wood consumption by plywood manufacturing units is likely to be influenced by countries rapid economic growth, population growth, rapid urbanization, technological advancements etc. Increases in construction, furniture production, and urbanization will accelerate the demand of plywood. Moreover, the Indian plywood industry is expected to grow at a CAGR of 6.74% from FY 2023-24 to FY 2028-29, from its current size of Rs 208.5 billion in FY 2022-23 to Rs 306.5 billion by FY 2028-29 (IMARC, 2023). Moreover, India is expected to have 1.7 billion people by 2047, with about 51% of them residing in cities. Consequently, by 2047, India will have to build almost 230 million dwelling units (StockGro, 2024). Thus, the plywood sector is expected to play a major role in meeting the housing demands.

Conclusion

Survey across India indicated that total number of plywood manufacturing units in India were approximately 3231. 71% with skewed distribution to north (37%) and south (34%) zones. The mean daily wood consumption was ranging from 0.15 M CUM RWE to 0.24 M CUM RWE in India. The total annual wood consumption was ranged from 54.89 to 85.62 M CUM RWE during year 2024. With the CAGR rate of 6.1%, the annual wood consumption volume would be 97.77 M CUM ranging from 73.81 M CUM to 115.12 M CUM in 2029.

Acknowledgement

Authors express gratitude to the Compensatory Afforestation Fund Management and Planning Authority (CAMPA), Ministry of Environment, Forest, and Climate Change (MoEF&CC), for their generous funding and support for the project titled "Assessment of Demand and Supply of Timber, Fuelwood and Fodder in India (AICRP-12).

References

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FIPPI's Concerns on Policy Frameworks Affecting Agroforestry Farmers & Wood-Based Industries

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FIPPI/212-2025 July 8, 2025

To,

Shri Tanmay Kumar
Secretary
Ministry of Environment, Forest and Climate Change (MoEF&CC)
Indira Paryavaran Bhawan, Jorbagh Road, New Delhi

Shri Devesh Chaturvedi
Secretary
Ministry of Agriculture & Farmers' Welfare (MoAFW)
Krishi Bhawan, New Delhi

Shri Amardeep Singh Bhatia
Secretary
Department for Promotion of Industry and Internal Trade (DPIIT)
Vanijya Bhawan, New Delhi

Subject: Concerns Regarding Policy Frameworks for Agroforestry.

Reference: *1. F. No. FP-8/8/2025-FP [E-261593] dated 18.06.2025 Model Rules for "Felling of Trees in Agricultural Land"*
2. Indian Forest & Wood Certification Scheme (PRAMAN) of MoEF&CC.

Dear Sir,

1. The Ministry of Environment, Forests and Climate Change has introduced two policy frameworks for wood produced from agroforestry: the Trees outside Forest Certification Scheme and Model Regulations for tree felling in agricultural lands without consultation with Wood Based Industries (WBIs) and farmers engaged as tree growers.
2. Tree growers under agroforestry are generally small land holders in India; however, they meet 92% of total wood demand in the country. To sustain the farm wood production drive in India, the wood-based industries have already created enough processing facilities for veneering, saw milling, plywood, MDF & particle board besides furniture and handicrafts so that the increased supply of such short duration timber is sustained, integrated to industries and enable farmers to get the remunerative prices for their produce.
3. The proposed Model Rules risk reversing years of progress made in deregulating tree felling on agricultural land, which has been pivotal in encouraging farmers to grow trees and in supporting the wood-based industries (WBI).

The requirement of mandatory registration on the National Timber Management System (NTMS), maintaining digital records, and verification and audits place a significant burden on small farmers, many of whom lack the technical capacity for such processes. There is a strong possibility that such rules, if implemented without simplification and wider stakeholder consultation, may discourage tree cultivation, disrupt the mutually beneficial ecosystem between farmers and WBI and adversely impact domestic wood production and employment in rural areas. The detailed concerns on "Model Regulations for tree felling in agricultural lands" are enclosed as Annexure 1.

4. Mandatory regulations under the control of State Forest Departments as envisioned in Model Regulations for tree felling in agricultural lands shall impose additional regulatory compliance burdens on farmers feeding the requirement of wood for WBIs especially for the exempted tree species which most of the states have done under the provisions of forests act prevailing in the state on the pursuance of the Ministry of Agriculture and Farmers' Welfare (list enclosed as Annexure 2).

4. Unfortunately, the PRAMAAN, in its Standard for Sustainable Management of Trees outside Forest in India, has introduced a very complex and cumbersome system of certification of Trees outside forests (TOF) in India. Most of the Criteria, Indicators and Intended Situations are either irrelevant or impractical to the Indian Agroforestry system, which are illustrated in some details in Annexure 3. None of them suit the certification of wood produced from the agroforestry system in India. In its present form, this scheme is based on intent to transfer burden of proof for Sustainability on farmers engaged in integrating trees in Agriculture landscape, which is intrinsically sustainable land-use practice as enshrined in National Agroforestry Policy 2014.

6. Institute of Wood Science and Technology in wide consultation with Federation of Indian Plywood and Panel Industry and other stakeholders developed an indigenous Agri-wood certification Scheme (copy annexed as Annexure 4) which is very simple, voluntary acceptable and easy to adopt. Apart from this, the system also ensures reliable digital proof of traceability as required in any other compliance framework such as EUDR, Lacey,s Act etc., It will distinguish between wood produced in the farm from timber produced in forests based on this certificate of origin.

7. Institute of Wood Science and Technology in consultation with all stakeholders including FIPPI had also submitted a draft to revise existing Wood Based Industries Guidelines incorporating the concept of making distinction between Agri wood and forest timber and introducing element of traceability on wood sourced from farmers by the industries. This draft was circulated for wider comments from the states.

8. Institute of Wood Science and Technology in consultation with all stakeholders including FIPPI has also submitted a framework for Green Credit for trees cultivated under Agroforestry to associate industries with the farmers engaged in Agroforestry. Recently FIPPI has sponsored a project to ICFRE to develop methodology for carbon credits for Agroforestry.

It is essential to engage with stakeholders, including WBIs, farmers, and rural communities, to ensure that the policy frameworks support the sustainable development of agroforestry and WBIs in India.

With regards

Rajesh Mittal
President
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

FP-8/8/2025-FP I/120946/2025

By Speed Post/Email

F.No. FP-8/8/2025-FP [E-261593]
Government of India
Ministry of Environment, Forest & Climate Change
(Forest Policy Division)

Indira Paryavaran Bhawan,
Jor Bagh Road, Aliganj,
New Delhi - 110 003
Dated: July, 2025

To,

The Chief Secretary
All State Governments / Union Territories

Subject: Adoption and implementation of Model Rules for Felling of Trees in Agricultural Land, 2025 by the States/Union Territories – regarding.

Ref: Ministry's Letter of even number dated 18.06.2025 (**copy enclosed**).

Sir/Madam,

Please refer to this Ministry's letter mentioned above, wherein the Model Rules for felling of trees in Agricultural Land, 2025 were shared with all States and Union Territories to facilitate time-bound, transparent, and simplified procedures for granting felling permissions on agricultural lands.

2. In continuation of the above, it is to inform that the Model Rules are intended for adoption or adaptation by States/UTs in accordance with their local legal provisions, administrative frameworks, and priorities.

3. It is further reiterated that the existing exemptions granted by State Governments for specified tree species from felling or transit permissions on private or agricultural lands shall continue to remain in force, unless modified by the respective State Government. The adoption of the model rules is not intended to alter or override the operational status of such exemptions.

4. The model rules are meant to streamline and simplify procedures only for those tree species which are currently regulated through felling or transit permissions, and States/UTs may incorporate relevant provisions as suited to their requirements.

This issues with the approval of the competent authority.

Yours sincerely,

Encl.: As above

Digitally signed by
Amit Anand
Date: 10-07-2025
09:44:01

(**Amit Anand**)
Deputy Inspector General of Forests
Email: forestpolicy-moefcc@gov.in

Copy for information to:

1. The Principal Secretary / Secretary (Forest), All State Governments / Union Territories.
2. The PCCFs & HoFF, All State Governments/Union Territories.
3. The DDGF (Central), All Regional Offices of MoEF&CC.

FP-8/8/2025-FP I/116793/2025

By Email

F. No. FP-8/8/2025-FP [E-261593]
Government of India
Ministry of Environment, Forest & Climate Change
(Forest Policy Division)

Agni Wing, 5th Floor
Indira Paryavaran Bhawan,
Jor Bagh Road, Aliganj,
New Delhi - 110 003
Dated: June, 2025

To,

Chief Secretary of all States and UTs.
All State Governments / Union Territories

Subject: Model Rules for "Felling of Trees in Agricultural Land" – regarding.

Sir/Madam,

The Government of India has been consistently promoting agroforestry as a viable solution to address multiple national priorities, including doubling farmers' income, enhancing tree cover outside forests, mitigating climate change, minimizing import of timber, and ensuring sustainable land use. Agroforestry not only enhances ecosystem services but also plays a critical role in diversifying livelihoods, increasing agricultural resilience, and contributing to India's Nationally Determined Contributions (NDCs) under the Paris Agreement.

2. To unlock the full potential of the agroforestry sector, it is imperative to establish an enabling regulatory framework that provides predictability and ease of doing business for farmers, entrepreneurs and investors. A key barrier identified by stakeholders is the lack of clear, harmonized rules for felling of trees grown on agricultural land, which hampers both cultivation and marketing of agroforestry produce.

3. In light of this, the Ministry convened two rounds of consultations with States on 24th April 2025 and 19th May 2025, where detailed discussions were held to solicit views on proposed reforms, and the need to streamline procedures related to felling of trees under agroforestry. Based on the feedbacks received, model rules for felling of trees in agricultural land have been developed and are being shared with all States and UTs (**copy enclosed**).

4. States/UTs are requested to examine the model rules and consider their adoption and notification for felling of trees in agricultural land. The objective is to enhance the ease of doing business in agroforestry and incentivize farmers to integrate trees into their farming systems without facing undue procedural hurdles.

5. The Ministry will extend necessary technical support to the States/UTs for

FP-8/8/2025-FP I/116793/2025

adoption, implementation, and capacity building required for integration of agroforestry.

This issues with the approval of competent authority.

Yours sincerely,

Encl: As above

Digitally signed by
Amit Anand
Date: 18-06-2025
19:35:04

(**Amit Anand**)
Deputy Inspector General of Forests
Mob: +91-7870096733
Email: forestpolicy-moefcc@gov.in

Copy to:

1. The Principal Secretary / Secretary (Forest)
All State Governments / Union Territories

2. The PCCFs & HoFF
All State Governments/Union Territories

Copy for information to:

1. PSO to Secretary (EF&CC), MoEF&CC.
2. PSO to DGF&SS, MoEF&CC.
3. PPS to ADGF (WL), MoEF&CC.
4. PPS to IGF (RRP), MoEF&CC.

MODEL RULES FOR FELLING OF TREES IN AGRICULTURAL LANDS

WHEREAS the [Government of [Name of State]/[Name of UT] Administration], recognizes the critical role of agroforestry in promoting sustainable agricultural practices and balancing ecological needs with economic development.

AND WHEREAS agroforestry practices are instrumental in enhancing tree cover, mitigating climate change, improving soil fertility, conserving biodiversity, water conservation and generating livelihood opportunities for rural communities;

AND WHEREAS the promotion of agroforestry aligns with the objectives of the National Agroforestry Policy, 2014, and India's commitments under international frameworks such as the United Nations Sustainable Development Goals (SDGs) and the Paris Agreement on Climate Change;

AND WHEREAS it is necessary to provide a streamlined regulatory framework for the promotion, maintenance, felling of trees and certification of timber produced from non- forest lands, thereby encouraging landowners, farmers, and stakeholders to adopt agroforestry practices while ensuring sustainable resource management;

AND WHEREAS effective market linkages are essential for creating economic opportunities and fostering sustainable agroforestry practices by connecting plantations with wood-based industries and consumers, thereby ensuring that the efforts of landowners and farmers result in tangible financial benefits;

AND WHEREAS agroforestry systems are identified as critical for addressing India's growing demand for timber, fuelwood, and fodder while reducing reliance on imports and alleviating pressure on natural forests.

AND WHEREAS agroforestry has the ability to enhance farmer incomes, improve soil organic carbon, conserve water resources, and significantly contribute to India's carbon sequestration goals, thereby promoting sustainable agricultural productivity and resilience.

AND WHEREAS the need is felt for the establishment of a streamlined regulatory framework to simplify procedures for tree felling, transit, and certification, thereby incentivizing private participation and creating opportunities for farmers and stakeholders to adopt agroforestry practices.

AND WHEREAS there is a need to promote high-value timber species, enabling India to achieve self-reliance in timber production and emerge as a global leader in sustainable timber markets.

NOW, THEREFORE, the following Rules are notified by the [Government of [Name of State]/[Name of UT] Administration] under section [relevant section] of [Name of State/UT act for regulating tree felling in non-Forest areas] and section [relevant section] of [Name of State/UT act for Forest areas] (in case of felling of trees of species protected under the said act) to promote, and regulate agroforestry practices, including procedures for the registration of land for agroforestry, felling of trees under agroforestry and certification/transit of timber produced from agroforestry.

1. Short title, extent and commencement

1.1. These rules may be called "Rules for felling of trees in agricultural lands in [Name of State/UT], 2025".

1.2. It extends to the whole of the [Name of the State/UT]

1.3. The rules shall come into force from the date of notification of these rules.

1.4. This rule suppresses all the provisions of extant rules applicable in the [Name of the State/UT] to the extent in conflict with this rule.

2. Definitions

2.1. "Agricultural land" means lands used for the purpose of agriculture as categorized by the State Government.

2.2. "Applicant" refers to any individual, institution, organisation owning agricultural lands seeking to register under this rule.

2.3. "Auditors" refers to individuals engaged by the Verifying Agencies having relevant qualifications and experience in forest management/ agroforestry.

2.4. "Authorised Department" refers to department(s) authorised by the State Government to monitor felling of trees and transportation of timber.

2.5. "Felling of trees" means cutting, girdling, pollarding, uprooting, application of arboricides, burning or damaging a tree in any manner OR actions defined under section [relevant section] of [Name of State/UT act for regulating tree felling in non-Forest areas]

2.6. "Felling Permit" means the authorization issued by the designated authority under the provisions of the [Name of existing tree-related legislation of the State/UT] for the felling of trees on agricultural lands, ensuring compliance with the prescribed conditions or permissions issued under section [relevant section] of [Name of State/UT act for regulating tree felling in non-Forest areas]

2.7. "Portal" refers to the National Timber Management System (NTMS).

2.8. "State-level Committee" means a committee identified under section 3 of this rule.

2.9. "Tree" includes palms, stumps, brush-wood and canes.

2.10. "Verification Report" means a report submitted by Verifying Bodies.

2.11. "Verifying Agencies" are agencies identified under section 5 of this rule.

3. State Level Committee (SLC)

3.1 The State Level Committee (SLC), constituted under the 'Wood-Based Industries (Establishment and Regulation) Guidelines, 2016', shall also act as the State Level Committee for the purposes of these Rules.

3.2 In addition to the existing members of the aforementioned committee, officers from the Revenue Department and the Agriculture Department shall be the additional members of the aforesaid committee.

4. Responsibilities of the State Level Committee

4.1. Notwithstanding any other law currently in force, the State Level Committee shall, in addition to the responsibilities assigned under the Wood-Based Industries (Establishment and Regulation) Guidelines, 2016, also undertake the following functions:

4.1.1. Advise on matters related to promotion of agroforestry in the State/UT.

4.1.2. Advise the State/ UT governments on enhancing timber production from agricultural lands through simplification of felling and transit regimes of commercially important timber species.

4.1.3. Prescribe the process and necessary qualification/experience for empanelment of Verifying agencies.

4.1.4. Empanelment of Verifying Agencies for verification of applications for felling and transit of timber from agricultural lands.

4.1.5. Promote the production of quality planting material through modern nurseries in the State/UT.

4.1.6. Facilitate use of technology for providing traceability of timber and its value-added products produced from agricultural lands.

4.1.7. Integrate the felling and transit modalities into the National Timber Management System (NTMS) for ease of doing business.

5. Registration of Plantation Area by the Applicant

5.1. Applicant(s) shall register in the National Timber Management System and submit the details including land ownership details and location of agricultural land.

6. Plantation Information and Record Keeping

6.1. The applicant shall provide initial plantation details, including the species- wise number of saplings planted, the month and year of planting, and the average height of the seedlings.

6.2. Applicant(s) shall update the details of the plantation periodically, as decided by the SLC.

6.3. Girth: The circumference of the tree trunk measured at a standard height (1.37 m above ground level).

6.4. Photo: A geotagged, KML file, image of each tree to ensure visual traceability and compliance.

6.5. Plantation information shall be monitored by the field functionaries of the Forest Department, Panchayat Raj Department, Agriculture Department.

7. Empanelment of Verifying Agencies

7.1. Verifying Agencies shall be empanelled by the SLC, which are agencies having expertise in forest management/ agroforestry operations.

7.2. The Verifying Agencies shall engage Auditors with relevant qualification and experience in forest management/ agroforestry

8. Issuance of Felling Permit

8.1. For agricultural lands with more than 10 trees

8.1.1. The Applicant seeking to fell trees from the registered plantations shall submit an online application in the National Timber Management System.

8.1.2. The Applicant shall provide the details of the trees to be felled as prescribed in the National Timber Management System.

8.1.3. The Verifying Agencies shall undertake field visits for issuance of felling permits.

8.1.4. The Verifying Agencies in their Verification Report [Format attached in Annexure I] shall include details about the land and trees, along with the projection of the quantity of timber that can be harvested.

8.2. For agricultural lands with up to 10 trees

8.2.1. The applicant seeking to fell trees from the registered plantations shall upload photos of their trees on the National Timber Management Portal.

8.2.2. The portal shall have the capability to compute the circumference and height of trees, as well as estimate the potential yield and identify the species, to facilitate the data entry process in the application form.

8.2.3. The applicant shall also be required to intimate the date of the felling of the above-mentioned trees.

8.2.4. Post felling of trees the applicant is required to upload photos of the stumps on the National Timber Management Portal.

8.2.5. The authorised department may also send an officer to the plantation site for physical verification.

9. Felling Permit

9.1. The Verifying Agency, upon issuance of the Verification Report shall generate a felling permit for agricultural lands with more than 10 trees, in a prescribed format.

9.2. A No Objection Certificate (NOC) for felling of trees shall be issued to the applicant automatically through the portal for agricultural lands with less than 10 trees.

10. Monitoring of Verifying Agencies

10.1. The Divisional Forest Officers (DFO) will monitor the functioning of the Verifying Bodies by periodic supervision and monitoring.

10.2. The DFO shall submit a quarterly report on the functioning of the Verifying Agencies to the SLC.

Annexure I

VERIFICATION REPORT FOR FELLING OF TREES IN AGRICULTURAL LANDS

1. Cover Page

1.1. Title of the report

1.2. Name of the third-party conducting the verification

1.3. Name of agency making request for verification along with contact details

1.4. Date of submission of verification report

2. Executive Summary

2.1. Concise summary of the objectives of Verification Report and major findings

2.2. Summary of site and plantation along with projections of timber output

2.3. Conclusions and key recommendations

3. Table of Contents

3.1. A clear listing of the report's sections, including appendices and figures.

4. Introduction

4.1. Project Background: Brief description of the plantation and other information such as:

4.1.1. State, District, Block, Village, Nearest Forest Area/Boundary

4.1.2. Geographical features, slope, terrain, hydrological conditions, soil type etc.

4.1.3. Geographical coordinates

4.1.4. Map of the plantation site

4.2. Purpose of the verification process, including scope and intended outcomes.

4.3. Details of the independent third-party verifier(s) conducting verification

5. Methodology

5.1. Actions undertaken during the verification process, field surveys and stakeholder consultations, and desk-based reviews.

5.2. Criteria and methods employed for assessing surviving sapling and projecting timber output

5.3. Description of primary and secondary data collected, including geospatial data, field measurements, data from the National Timber Management System portal and remote sensing imagery.

5.4. Sampling Approach along with justification for the selection of methodology: Explanation of sample size and sampling methods for field surveys.

6. Site Assessment and Outcomes

6.1. Overview of the plantation site

6.2. Comprehensive assessment of the present state of plantation efforts inferred by field data and observations.

6.3. A detailed analysis of historical images available on platforms like google earth since the plantation to verification period.

6.4. Comparison of baseline and current status, emphasizing observed progress or identified setbacks.

6.5. Tree wise data sheet with assessment of timber expected to be produced against each tree.

7. Constraints and Limitations

7.1. Challenges faced during the verification process, such as access limitations and data deficiencies, along with external factors influencing outcomes, including climate variability and socio-economic constraints.

8. Conclusion

8.1. Summary of the verification's key findings, including the overall progress achieved and areas requiring additional attention.

8.2. Final assessment of the project's success, sustainability, and alignment with intended outcomes

9. Annexures

9.1. Supporting documents including:

9.1.1. Geospatial maps and site photographs

9.1.2. Field survey data and additional technical reports.

9.1.3. References and other relevant materials.❑

Readers are invited to send views, comments and suggestions if any, addressed to Editorial board
We also invite your valuable Advertisement and Article to be published in the Journal.

"INDIAN WOOD & ALLIED PANELS"

A Quarterly Journal on Plywood and Panel Industry

1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008, India
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FIPPI's Proposal for R&D Collaboration on Clone Development between FIPPI and ICFRE

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY

REGISTERED UNDER THE SOCIETIES REGISTRATION ACT XXI OF 1860, REGN. NO. S/2985/1968-69 DT. 4.1.1969

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July 28, 2025

To,
Smt. Kanchan Devi,
Director General
Indian Council of Forestry Research & Education
P.O. New Forest Dehradun – 248006

Subject: Request for Signing of MoU for R&D Collaboration on Clone Development Specific to the Plywood and Panel Industry.

Respected Madam,

This is with reference to the discussions held during the meeting at the Institute of Wood Science and Technology (IWST), Bengaluru, on 4th July 2025 and further deliberated in the FIPPI Committee Meeting convened on 10th July 2025 in New Delhi.

The issue of clone development specifically tailored to the needs of the plywood and panel industry was highlighted in both meetings as a matter of strategic importance. A strong consensus emerged on the urgent need to initiate dedicated, time-bound R&D efforts for the development of species and region – specific clones suitable for the plywood and panel industry, moving beyond the current reliance on clones developed for the paper industry.

Please find below an excerpt from the proceedings of the FIPPI Committee Meeting held on 10th July 2025 for your kind consideration:

Excerpt from FIPPI Committee Meeting – 10th July 2025:

During the FIPPI Committee meeting held on 10th July 2025 in New Delhi, Dr. M.P. Singh emphasized the urgent requirement for independent R&D focused on developing clones specifically suited to the plywood and panel industry. He proposed initiating a dedicated research project to identify and multiply suitable clones. The proposal was strongly supported by FIPPI office bearers and members.

Key suggestions from the members included:

1. The project should be time-bound with fast-track deliverables.
2. The initiative must consider regional variation and species suitability.
3. Alternative raw materials beyond clones developed for the paper industry should be explored.
4. Inclusion of short-rotation clones in the research agenda.
5. Formation of a sub-committee to oversee the initiative.

6. Regional industry associations to contribute financially to a common R&D fund to ensure ownership and accountability.

Accordingly, it was proposed that a Memorandum of Understanding (MoU) be signed with ICFRE to facilitate collaboration and strengthen efforts in the following areas:

- Multiplication of existing clones through extended facilities.
- Development of new clones with lignin characteristics suited to plywood and panel products.
- Species selection and R&D to be undertaken on a region-wise basis for improved adaptability and performance.

In view of the above, we request your kind consideration for initiating the process of signing an MoU between ICFRE and FIPPI, in alignment with the objectives outlined above. This collaboration will play a vital role in ensuring the long-term raw material sustainability and technological advancement of the plywood and panel sector in India.

We look forward to your positive response and continued support.

With Regards,

Dr. M.P Singh (retd IFS)
Director General
Federation of Indian Plywood & Panel Industry (FIPPI)
1005, Vikrant Tower, 4 Rajendra Place, New Delhi-110008

FEDERATION OF INDIAN PLYWOOD & PANEL INDUSTRY (FIPPI)

FIPPI MANAGEMENT TEAM

Dr. M.P. Singh
Director General, FIPPI

Dr. C.N. Pandey
Senior Technical Advisor, FIPPI

Mr. J.K. Jain
Senior Sustainability Advisor, FIPPI

Mr. Ajay Kumar
Senior Economic Policy Advisor, FIPPI

Mr. Pragath Dvivedi
Technical & Economic Advisor, FIPPI

Dr. Richa Bansal
Assistant Director, FIPPI

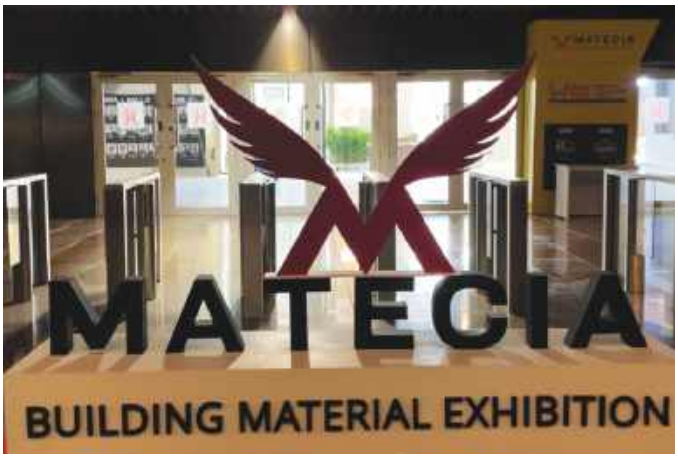
Mr. Rishabh Gandhi
Economic Officer, FIPPI

Mr. Anthony Fernandes
Office Secretary, FIPPI

Ms. Kavita Goyal
Office Assistant, FIPPI

FIPPI at MATECIA Exhibition 2025

MahaKumbh of Interior & Building Products



MATECIA Exhibition is one of India's premier platforms for the building materials, architecture and design industry. It brings together manufacturers, trade professionals, architects, interior designers and policymakers to showcase innovations, exchange knowledge and explore new business opportunities. The 5th edition of the exhibition, held at the state-of-the-art Yashobhoomi, Dwarka, New Delhi, from 21st to 24th August 2025, attracted a diverse spectrum of participants and visitors from across India and overseas.

The presence of FIPPI and its members underscored the exhibition's importance as India's largest marketplace for interiors and building materials. MATECIA's strong alignment with the 'Make in India' initiative was clearly reflected, offering Indian manufacturers a robust platform to highlight their innovations and expand their business networks. With over 300 exhibitors and more than 55,000 business visitors from 600+ towns and cities across India and 14 other countries, the event firmly upheld its reputation as the MahaKumbh of Interior & Building Products. It also served as a valuable forum for FIPPI members to engage with industry peers, explore technological advancements and foster new collaborations. The exhibition ran in parallel with several key events including THE WADE ASIA Architecture Event, India Furniture Conclave, India Interior Retailing Conference, ArchiDesign National Design Competition, Design Galore and Material Adda, further enhancing its significance and reach.

Setting the Stage: MATECIA 2025 Inauguration and FIPPI President's Visionary Address

The exhibition's inauguration was graced by the Guest of Honour, Mr. N.K. Agarwal, Patron, FIPPI & Chairperson, Action Tesa Group; the Chief Guest, Mr.Rajesh Mittal, President, FIPPI & CMD, Greenply Industries Ltd; the

Director General of FIPPI, Dr. M.P. Singh; along with Chairpersons and esteemed guests from various industries. The inauguration truly set the tone for four remarkable days of MATECIA, bringing together industry pioneers, trade leaders and design professionals on India's most influential platform for building materials, architecture and interiors.

Following the grand inauguration ceremony of MATECIA 2025, Mr. Rajesh Mittal took the stage to deliver

his special address. In his remarks, Mr. Mittal highlighted the robust growth trajectory of India's plywood and panel industry, attributing it to rising incomes and the expansion of the real estate sector. He emphasized that the newly implemented Quality Control Orders (QCOs) would be a game-changer, curbing low-quality imports, boosting domestic manufacturing and creating over 8 lakh jobs in the short term. Looking ahead to 2030, he projected the sector's potential to generate $2 billion in exports and 1.5 million new jobs. He urged the industry to strengthen supply chains, ensure sustainable raw material sourcing and enhance quality and efficiency to become globally competitive, particularly in view of the upcoming Furniture QCO in February 2026.

Dr. Kiran Bedi Launches FIPPI Brochure at MATECIA 2025

Following the inauguration ceremony of MATECIA 2025, the exhibition was honoured by the gracious presence of Dr. Kiran Bedi, former IPS officer and the 24th Lieutenant Governor of Puducherry, as the Special Guest of MATECIA 2025. Her remarkable journey and unwavering dedication to public service continue to inspire millions across the nation. During her special address to the esteemed delegates from the Indian plywood and panel industry, Dr. Bedi officially launched the FIPPI brochure. She commended the work of FIPPI and encouraged Chairpersons and delegates from various industries to join FIPPI, highlighting the importance of unity and collective action for the growth and empowerment of the Indian plywood and panel industry.

FIPPI Welcomes Mr. Pragath Dvivedi as Technical and Economic Advisor

A special moment during the event was the felicitation of Mr. Pragath Dvivedi, Founder of Ply Reporter, by Dr. M.P. Singh, Director General, FIPPI, in the presence of Mr. Rajesh Mittal, President, FIPPI. Mr. Dvivedi was honoured with the position of Technical and Economic Advisor to FIPPI, a role in which he will provide crucial guidance to drive industry growth. His appointment was met with enthusiastic applause, reflecting the industry's confidence. He is expected to strengthen FIPPI's efforts in shaping policies, promoting innovation and ensuring the long-term sustainability of the sector.

Inauguration of the FIPPI Stall at MATECIA 2025

The FIPPI stall was officially inaugurated by Mr. Surinder Arora, Managing Director, Virgo Group, in the presence of Mr. Rajesh Mittal, President, FIPPI & CMD, Greenply Industries Ltd. This marked a significant moment for FIPPI, as the stall served as a central point for members and visitors to interact, discuss industry challenges and learn about FIPPI's initiatives. The presence of key industry leaders at the inauguration highlighted FIPPI's growing

influence and its commitment to fostering collaboration and progress within the sector.

Keynote Address by Keshav Bhajanka Highlights Future Growth at MATECIA 2025

A major highlight of the second day of the exhibition was the keynote address delivered by Mr. Keshav Bhajanka, Vice President, FIPPI, and Executive Director, Century Plyboards, on "Future Growth: Rise of Panel Products, Decorative & Interior Business in India." Mr. Bhajanka's speech provided a detailed overview of dynamic market shifts, highlighting several key areas. He noted the immense size of the opportunity, estimating the market at over ₹75,000 crore with a CAGR of 8-9%. He stated that India is at a significant inflection point, similar to China's experience, driven by strong government pushes on housing, infrastructure and BIS mandates.

Mr. Bhajanka also addressed the industry's transformation, noting a major shift in demand for Century Plyboards' products and highlighted Century Plyboards' own journey from a "ply behemoth" to a leader across categories such as plywood, laminates, medium-density fibreboards and particle boards. He emphasized that the plywood share in Century Plyboards' broad product mix has reduced from an earlier 80% to around 60%, reflecting a broader change in the market. The influence of social media and other factors shaping the future of the

industry were also key themes in his address. His insights resonated strongly with the audience, underscoring the industry's potential to transform India's interior and design landscape. Following his address, Mr. Bhajanka visited the FIPPI stall to meet with the FIPPI team and engaged in insightful discussions.

FIPPI at the Forefront of Knowledge-Driven Discussions

At MATECIA 2025, FIPPI's leadership team played a pivotal role in disseminating knowledge. During the various sessions of the Materials and Technology Conclave, several FIPPI leaders, including Dr. M.P. Singh, Director General; Dr. C.N. Pandey, Senior Technical Advisor; and Mr.

J.K. Jain, Senior Sustainability Advisor, took the stage to participate in insightful discussions aimed at enlightening the audience on recent developments in the industry.

Dr. M.P. Singh contributed to sessions on 'Emerging New Challenges & Requirements in Panel & Furniture Industries,' 'BIS Enforcement: The Know-How for Trade Concerns' and 'Why Vietnam is Cost Effective?' Dr. C.N. Pandey spoke on 'BIS Enforcement: Analysing the Impact on Wood Panel Industry and Way Forward,' while Mr. J.K. Jain addressed the session 'Plantation by the Industry, for the Industry: Scenario Ahead.'

FIPPI Strengthens Ties with Japanese Export Wood Council

On the third day of the exhibition, a delegation from the Japanese Export Wood Council visited the FIPPI stall to gain deeper insights into the Indian plywood and panel industry. This meeting offered a valuable opportunity for exchanging knowledge and understanding market nuances, marking an important step in strengthening international relations. The interaction is expected to help FIPPI and its members stay informed about global market trends and innovations, fostering closer collaboration between the two industry bodies.

FIPPI's Outreach During the Exhibition

Throughout the exhibition, the FIPPI team actively engaged with various industry players, successfully connecting with over 40 exhibitors, potential members, and initiating valuable discussions that strengthened professional relationships. The FIPPI stall served as a hub of activity, welcoming 150 visitors who explored FIPPI's initiatives, membership opportunities and discussed the industry's future. This high level of engagement underscores the strong interest and recognition of FIPPI as a key driver of growth and collaboration in the sector.

Reflections from MATECIA 2025

FIPPI's participation at MATECIA 2025 was met with widespread acclaim from attendees across the industry. The organization not only reinforced its position as a

leading voice but also garnered appreciation for its invaluable contributions and visionary discussions. This exhibition marked a pivotal milestone, reaffirming FIPPI's commitment to driving innovation and sustainable growth and leaving a lasting, positive impact on the future of the plywood and panel industry.

FIPPI interacted with Kridha Laminates delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Saptam Décor delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Neelgiri Wood Crafts & Laminates delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Tribeca Panel India delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Pioneer Panel Products delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Manilam delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Hillwud Ply delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Crossbond delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Dorby delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Bhutan Tuff delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Motherwood delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Advance Ply delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Billion Ply delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Vrinda Mica delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Shiva Plywood Industries delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Kokam Ply delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Nice Ply delegates, extending an invitation to join the federation as a member.

FIPPI interacted with Infinity Boards delegates, extending an invitation to join the federation as a member.

FIPPI interacted with JSV Plywood & Laminates delegates, extending an invitation to join the federation as a member.❑

FEDERATION OF INDIAN PLYWOOD
AND PANEL INDUSTRY

Together we are stronger!

Our Primary Members

1 AK Apple Ply Pvt. Ltd.
2 Amazon Wood Pvt. Ltd.
3 Amulya Mica Industries Pvt. Ltd.
4 Archidply Industries Ltd.
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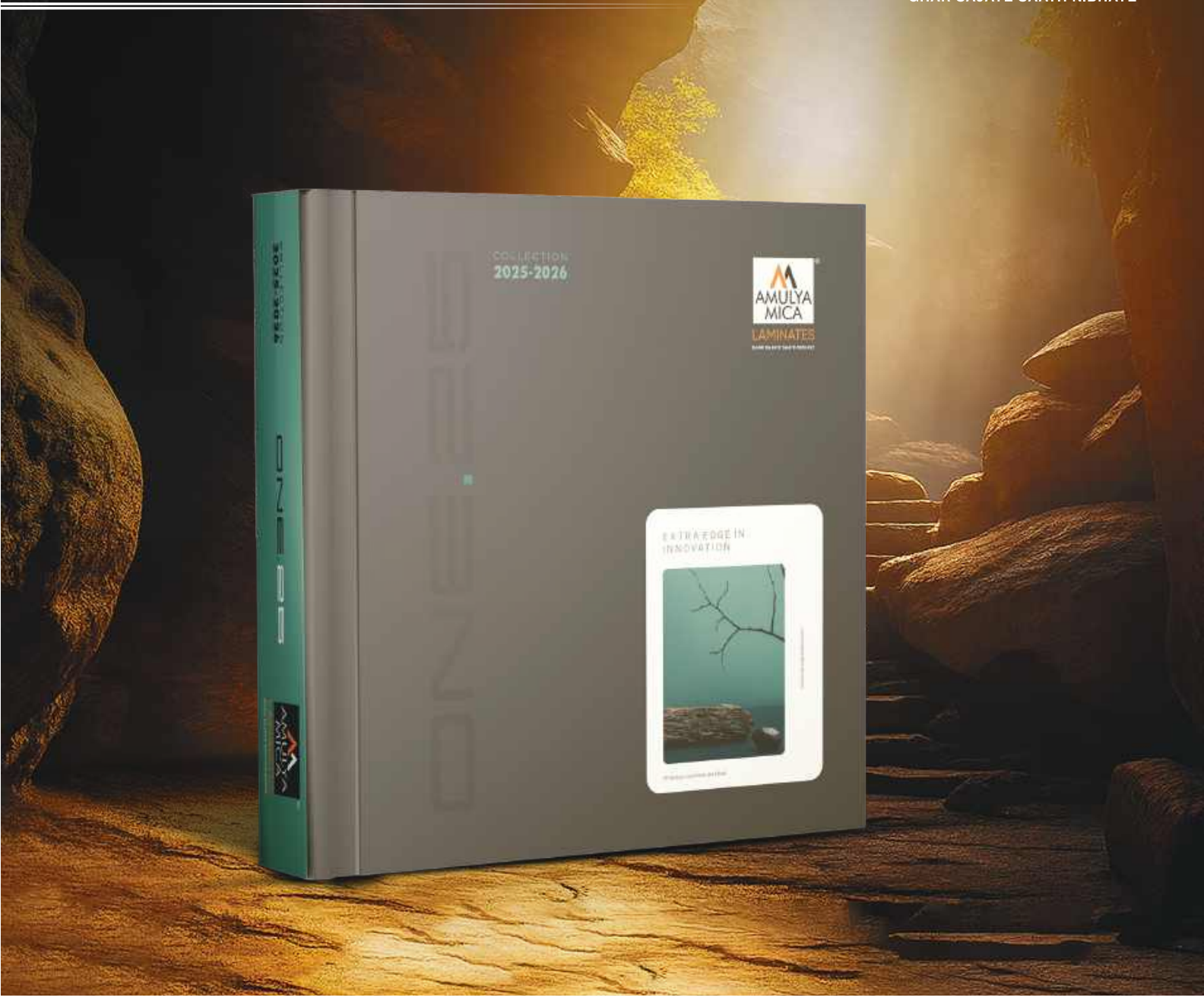

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