

Voice of FIPPI

Indian Wood & Allied Panels

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A Quarterly Journal on Plywood and Panel Industry in India

April - June 2026



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CONTENTS

(April - June 2026)

SPECIAL FEATURE ----- 09 - 16

- Enhancing the Export Competitiveness of India's Plywood and Panel Industry **9**



Meeting with **Shri Rajesh Agarwal**, Secretary, Department of Commerce, Ministry of Commerce & Industry, during Bharat Buildcon 2026

- Future-Ready by Design: Sustainability & Innovation in India's Plywood & Panel Ecosystem **12**
Indian Kitchen Congress 2026



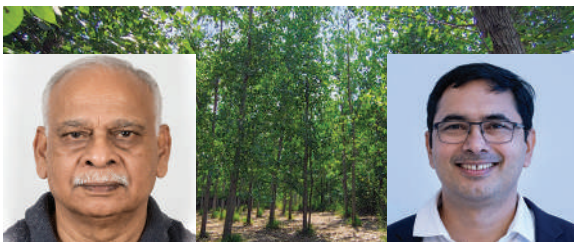
- How Mr. Deendayal Daga Built a Timber Empire from `50,000* _ **14**



- **Deen Dayal Daga**, Chairman, Archidply Industries Ltd

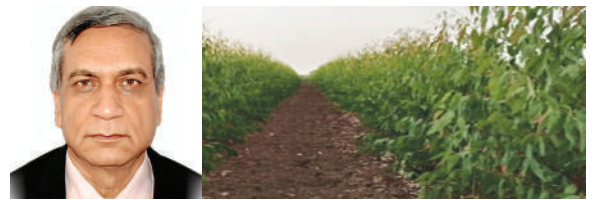
RAW MATERIAL SUSTAINABILITY ----- 17 - 49

- Building a Sustainable Future
Plantation Initiatives & Raw Material Sustainability **17**



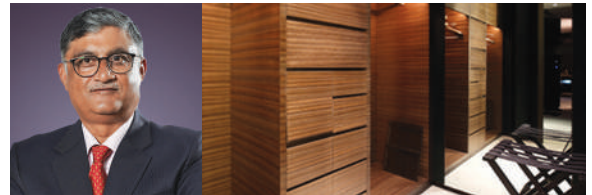
- **Ajay Baldawa**, Executive Director, Century Plyboards (India) Limited
- **Sunil Shekhawat**, Head of Manufacturing, R&D and Technology-MDF & Particle Board, Century Plyboards (India) Limited

- Greenply's Sustainable Initiative: Driving Socio-Economic Upliftment of Rural India **25**



- **Jinendra Kumar Jain**, Senior Sustainability Advisor, FIPPI & National Head, Greenply Industries Ltd.

- Sustainability: Plantation Initiatives of the Industry **31**



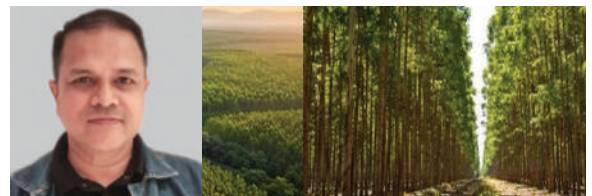
- **Jaydeep Chitlangia**, Senior Vice President, FIPPI and Mentor, Duroply Industries Ltd.

- It takes two to tango. Action TESA & Indian Farmers' Power Future of Sustainability Through Scientific Plantation Management **34**



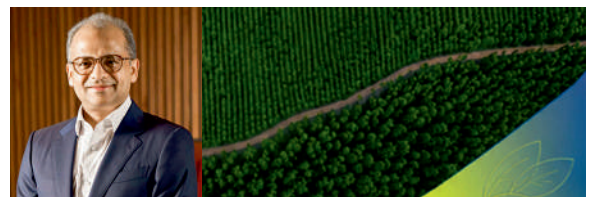
- **Rajeshwar Nair**, Project & Plant Head, Action TESA

- Building a Sustainable Future: Greenpanel's Journey Towards Responsible Growth **38**



- **Purushottam Sharma**, Head-Product Development & Research, Greenpanel Industries Ltd.

- Rooted in Responsibility: Greenlam's Sustainable Future Blueprint **40**
Innovations and Initiatives in the Plywood & Panel Industry



- **Saurabh Mittal**, Managing Director & CEO, Greenlam Industries Limited

- Saplings to Sustainable Supply Chains: Merino's Agroforestry and Soil Conservation **43**



- **Ajay Kumar**, Advisor (Economics, Strategy & Sustainability), Merino Group & Senior Economic Advisor, FIPPI

- Evaluation and Extension of Clones/Varieties Developed by ICFRE for the Plywood and Panel Industry **46**
FIPPI Signs MoU with ICFRE to Strengthen India's Raw Material Security
- A Round Table Discussion on a Long-Term Roadmap for Scaling Agroforestry **48**
Organised by Council on Energy, Environment and Water (CEEW) and BITS Pilani Goa Campus / 13 May 2026, New Delhi

QUALITY & STANDARDS ----- 50 - 69

- Recognition of Indian Standards Key to Boosting Exports of Wooden Panel Products **50**



- **Sandeep Gupta**, Partner, Northern Plywood Products & General Secretary, Uttarakhand Ply Manufacturers Association
- UK UP Ply Manufacturers Association at the Forefront of Modernizing ISI Standards **51**
- Road Map for Process Improvement in Plywood Manufacturing Through Scientific Veneer Drying and Moisture Management **52**
– **Subir Ray Chaudhuri**, Consultant
- FIPPI Submits Comments on Applicability of Revised Limits of Formaldehyde Class E2 Across Standards **54**
- Safeguarding the Integrity of Quality Control Orders: FIPPI Responds to Representation on Birch Plywood & Radiata Pine MDF **55**
- FIPPI Submits Representation on Urea Use in the Wood-Based Panel Industry **57**
- Request for Adherence to the Fertilizer (Control) Order, 1985 (FCO) of the Essential Commodities Act, 1955 (ECA)-Regarding Technical Urea **59**
- Key Updates on Quality and Standards **60**
- Ensuring Continued Policy Stability for Quality Control Orders: FIPPI Submits Updated Assessment on the Impact of QCOs on the Plywood and Wood-Based Panel Industry **62**
- Highlighting the Positive Impact of Quality Control Orders: FIPPI Submits Data on Quality Improvements in Plywood and Wood-Based Boards **64**
- Promoting Urea Free Resin Technologies for the Wood-Based Panel Industry: FIPPI Highlights the Transition Towards Urea-Free Resin Systems **65**
- Draft Eco Mark Criteria for Wood and Wood Substitute Products For Comments **67**

TRADE & TAXATION ----- 70 - 84

- Putting Agroforestry at the Centre of India's Trade Policy **70**
Why Made-in-India Wood Panel Products Deserve a Place in the Exclusion List in Future FTA Negotiations
- India's Plywood & Panel Imports: A Changing Landscape **73**
– **Rishabh Gandhi**, Economic Officer, Federation of Indian Plywood & Panel Industry (FIPPI)
- Ensuring Competitively Priced Industrial Inputs for Downstream Manufacturing Industries: FIPPI Requests

Withdrawal of the Anti-Dumping Investigation on Phenol Imports **76**

- Exploring Global Business Opportunities & International Trade: FIPPI Invites Members to Business Delegations to Chile **83**
- Exploring Global Business Opportunities & International Trade: FIPPI Invites Members to Business Delegations to New Zealand **84**

POLICY & ADVOCACY ----- 85 - 100

- Applicability of New Labour Codes to Agroforestry Tree-based Production Systems **85**
– **R C Dhiman**, Advisor - Sustainable Agroforestry Initiatives, Greenlam Industries Ltd. (Ex-Unit Head, Wimco Seedlings ITC-PSPD) and **T D Khurana**, Ex-Unit Finance Head, Wimco Seedlings-ITC PSPD.
- Promoting Agroforestry-Based Industrial Growth in Jharkhand: FIPPI Requests for Inclusion of Plywood and Wood Panel Industry (MDF, Particle Board, and Flush Doors) Utilizing Agroforestry Timber under the Priority Sector **92**
- Supporting Continued Policy Stability for Quality Control Orders: FIPPI Highlights the Transformational Impact of QCOs on the Plywood and Panel Industry **94**
- Promoting Agroforestry-Led Industrial Development in Bihar: Policy requests for support to Agroforestry-Based Wood Industry as the High Priority Sector in Bihar **95**
- Facilitating Uniform Implementation of MoEF&CC Guidelines for Wood-Based Industries: FIPPI Seeks a Registration-Based Framework for Agroforestry-Driven Industrial Growth **97**
- Creating an Enabling Policy Ecosystem for the Indian Plywood & Panel Sector: FIPPI Recommends Key Policy Reforms to NITI Aayog **99**

MEETINGS ----- 101 - 111

- Minutes of the Meeting of FIPPI Committee Meeting, held on 10th April 2026 **101**
- FIPPI Holds Strategic Discussions with DPIIT on Implementation of QUALITY CONTROL ORDERS (QCOs) for Plywood & Panel Industry **107**
- FIPPI Participates in Stakeholder consultation on QCOs under the High- Level Committee on Non- Financial Regulatory Reforms at NITI Aayog on 3 June 2026 **108**
- World Environment Day- 5 June 2026 **109**
Workshop on Innovative Approaches on the Development of Urea-Free Resin: Open Discussion & Need for Validation Organised by FIPPI & ICFRE-IWST, Bengaluru

EVENTS ----- 112 - 123

- FIPPI Participates in Navbharat Times Conclave – Uttarakhand Samvad 2026 **112**
- FIPPI Delegation Visit to XYLEXPO 2026 **113**
Strengthening India-Italy Collaboration in Woodworking Technologies
- Amulya Mica wins Prestigious "Emerging Premium Laminate Brand of the Year 2026" Award at ET NOW Business Conclave & Awards 2026, Ahmedabad on 16th June 2026 **114**
- FIPPI Showcases India's Wood Panel Industry at Bharat Buildcon 2026 **115**
- Plywood / Wood Industry Investors Visit to Lucknow (22 - 23 June 2026) **121**

Enhancing the Export Competitiveness of India's Plywood and Panel Industry

Meeting with Shri Rajesh Agarwal, Secretary, Department of Commerce, Ministry of Commerce & Industry, during Bharat Buildcon 2026



As part of Bharat Buildcon 2026, held at Yashobhoomi, New Delhi during 18-21 June 2026, a high-level meeting was organized with Shri Rajesh Agarwal, Secretary, Department of Commerce, Ministry of Commerce & Industry, Government of India. A delegation from the Federation of Indian Plywood & Panel Industry (FIPPI) and Indian Laminates Manufacturers Association (ILMA), participated in the meeting with the Secretary to discuss key policy reforms aimed at strengthening India's plywood, laminates, and wood panel industry for exports. The discussions focused on strengthening India's manufacturing ecosystem, enhancing global competitiveness, promoting exports, and creating new growth opportunities for the plywood, laminates, and wood panel industry.

Following the meeting, Shri Rajesh Agarwal visited the FIPPI Pavilion, where he appreciated the Federation's initiatives towards promoting sustainable industrial growth, quality manufacturing, and export development. His visit reaffirmed the importance of close collaboration between the Government and industry in advancing India's manufacturing and export ambitions.

During the meeting, FIPPI formally presented three policy brochures outlining the Federation's recommendations for strengthening the competitiveness, sustainability, and export potential of India's plywood and panel industry.

A. Continued Policy Stability for Quality Control Orders (Plywood and Panel Products)

FIPPI highlighted the transformative impact of the recently implemented Quality Control Orders (QCOs) on the plywood and wood panel industry. The QCOs have accelerated industry formalization, encouraged fresh investments, promoted import substitution, and established

a level playing field for compliant domestic and overseas manufacturers. The implementation of QCOs brought about clear and measurable changes across the plywood and panel industry, including:

- **Expansion of licensed units:** BIS-licensed manufacturing units have increased from around 800 to over 2,400.
- **Higher compliance levels:** Industry compliance is estimated to have increased from approximately 30% to nearly 80%.
- **Driving level playing field:** QCOs have provided a fair and non-discriminatory market access for compliant overseas manufacturers by granting them BIS certifications.
- **Growth in domestic production and investment:** Domestic production has increased by nearly 15%, supported by investments exceeding ₹3,600 crore towards capacity expansion.
- **Improved market stability:** Greater scale efficiencies have enabled manufacturers to better absorb rising input costs while ensuring consistent product quality.
- **Supporting farmers, rural economies and environmental sustainability:** More than 3.5 million people are employed in plantations, processing and allied operations, generating additional rural income and strengthening rural economies.
- **Strengthening the downstream value chain:** Supported more than 1 million carpenters & woodworking entrepreneurs who gained confidence through quality products. Around 4 lakh certified under PM Vishwakarma Scheme.



B. How the Right Policy Reforms Can Reduce India's Wood Import

FIPPI highlighted the vision for reducing India's growing dependence on imported wood and wood-based products through strategic policy reforms. It was emphasized that reducing imports is not merely an economic necessity but a step towards achieving the Hon'ble Prime Minister's vision of Atmanirbhar Bharat and economic patriotism by promoting domestic manufacturing and self-reliance.

India's imports of wood and wood-based products reached ₹78,321 crore in FY 2024-25, representing a significant outflow of foreign exchange. To address this challenge, FIPPI recommended key policy reforms:

- **Enactment of a National Agroforestry Act** to effectively implement the National Agroforestry Policy and simplify regulations for farmers.
- **Establishment of a National Agroforestry Board** to coordinate efforts among farmers, industry, research institutions, and financial stakeholders.
- **Equal policy support for agroforestry crops**, including a Digital Certificate of Origin and Ownership (COO) and globally recognized "AgriWood" standards to facilitate transparent and barrier-free trade of farm-grown timber.
- **Relaxation of felling and transit regulations** for agroforestry timber to encourage greater tree cultivation and improve domestic wood availability.

These reforms are expected to deliver long-term benefits, including conservation of foreign exchange through lower imports, increased rural employment and farmer incomes by promoting agroforestry, and improved environmental sustainability through enhanced carbon sequestration and expanded tree cover outside forests.

C. Enhancing Export Competitiveness of the Plywood and Panel Industry

FIPPI emphasised that the successful implementation of QCOs has created a strong foundation for enhancing the export competitiveness of the plywood and wood panel sector in India. India possesses significant potential to



emerge as a leading global manufacturing and export hub for plywood, wood panels, and allied products owing to its cost-competitive manufacturing ecosystem, abundant skilled workforce, and strong downstream furniture and wood-processing industries.

Historically, India was a recognised exporter of plywood during the 1960s, demonstrating the industry's ability to compete successfully in international markets.

Exports of plywood and allied products from India reached approximately USD 1.48 billion in 2024-25, registering a CAGR of 6.81% over the last decade.

Despite having the world's fifth-largest domestic plywood market, India's participation in global plywood trade remains modest. In 2023, India exported only USD 61 million worth of plywood (HS 4412), accounting for merely 0.41% of the USD 15 billion global plywood trade, highlighting substantial untapped export potential. In this context, FIPPI submitted several policy recommendations to the Department of Commerce:

1. **Rationalization of Basic Custom Duty (BCD):** To enhance global competitiveness and promote domestic value addition, Basic Customs Duty (BCD) on logs, sawn wood, veneers, and critical industrial chemicals such as technical-grade urea, phenol, and melamine may be reduced to 0%, while the BCD on wood panels (plywood, MDF, and particle board) may be increased to 25%.
2. **Enactment of National Agroforestry Act:** India's plywood and panel industry faces a persistent shortage of quality timber along with the high cost of timber, which remains the most critical constraint to its growth and competitiveness. In this regard, a dedicated National Agroforestry Act is needed to implement the National Agroforestry Policy, supporting the integration of trees into farming systems and relieving farmers from administrative obstacles.
3. **Developing a National Digital Timber Traceability Framework:** Establish a robust digital timber traceability system to demonstrate legality, sustainability, and responsible sourcing of timber,

providing an alternative to international certification systems.

4. **Ease of Doing Business for Wood-Based Industries:** Simplify regulatory requirements for establishment and expansion of wood-based industries and encourage private forestry and plantation investments to strengthen the raw material ecosystem.
5. **Safeguarding Plywood and Panel Products in FTAs:** Retain plywood, MDF, particle board, and allied wood panel products in the exclusion list under FTAs, considering their sourcing of raw material from farm-grown timber, enhancing farmer livelihoods, and domestic value addition.
6. **Establishment of a Dedicated Export Promotion Council:** The Federation highlighted that, despite the sector's strong export prospects, plywood and allied products have not received adequate export promotion support from CAPEXIL. Limited market studies and promotional initiatives have been undertaken for the sector, restricting its ability to access emerging global markets. FIPPI therefore recommended the establishment of a dedicated Export Promotion Council for Plywood and Allied Products to undertake focused market development, international branding, buyer-seller engagements, export facilitation, and trade promotion activities.
7. **Building India's Sustainable Wood Narrative:** FIPPI emphasised the need to position Indian plywood and panel products through a distinctive global sustainability narrative. A key strength of the Indian plywood industry is that over 90% of the timber used is sourced from agroforestry—farm-grown trees cultivated on private agricultural land (AgriWood), creating sustainable livelihoods for millions of farmers while expanding tree cover outside forests. In contrast, countries such as Vietnam primarily source timber from plantations established on government-allocated or leased forest land. This farmer-centric sourcing model provides India with a unique and compelling competitive advantage in global markets.



FIPPI therefore recommended promoting Indian plywood and panel products internationally as sustainable, renewable, carbon-locking materials that support agroforestry, strengthen rural economies, and contribute to climate change mitigation as additionality.

Conclusion

FIPPI highlighted that the implementation of QCOs has significantly enhanced the quality and reliability of Indian plywood and panel products. Today, only standardized, BIS-certified products are entering the organized market, improving consumer confidence while positioning Indian products to compete more effectively in international markets.

The delegation requested Shri Rajesh Agarwal to support the policy initiatives proposed by FIPPI for creating a robust export ecosystem for India's plywood and panel industry. With sustained policy support and a conducive export ecosystem, India can substantially increase its share in global plywood and wood panel trade and emerge as a leading exporter of plywood and allied products. The export potential of plywood and allied products is expected to double by 2030, while simultaneously strengthening agroforestry-based rural economies, generating employment, enhancing farmer incomes, and advancing India's sustainability and climate objectives. □

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Future-Ready by Design: Sustainability & Innovation in India's Plywood & Panel Ecosystem

Indian Kitchen Congress 2026

Shri Jaydeep Chitlangia, Senior Vice President, FIPPI, addressed the audience at the Indian Kitchen Congress (IKC Communities) held in New Delhi on 10 April 2026, sharing valuable insights on "Future Ready by Design – Sustainability and Innovation in India's Plywood & Panel Ecosystem."



Over the past decades, I have seen India's plywood and panel industry evolve from a traditional craft to a strategic pillar of our country's construction and interior landscape. And today, more than ever, the decisions we make as an ecosystem will define how India builds for the next generation.

Rooted in sustainability and driven by innovation, the plywood and panel industry continues to support India's economic growth while advancing climate-conscious, future-ready material solutions. Today, this sector comprises over 3,000 manufacturing units across the country — largely MSMEs — with a market size exceeding ₹50,000 crore.

What makes our industry truly unique is that it is deeply end-consumer and carpenter driven. The vast majority of kitchens, wardrobes, and interior solutions in India are still custom-built at homes by carpenters, directly aligning with the PM Vishwakarma Scheme, which supports over one million carpenters and woodworking entrepreneurs, including nearly four lakh certified professionals under the scheme.

At the same time, our industry is intrinsically linked to sustainability. Nearly 92% of our raw material comes from plantation and agroforestry timber, supporting more than one million farmers and aligning with the government's objective of Doubling Farmers' Income.

Our country is transforming at a remarkable pace. The interior and furniture segment is growing at nearly 12–14% annually, and the modular kitchen category is rising even faster — close to 20% year-on-year. These numbers are not merely statistics. They reflect the aspirations of a young, ambitious India. They reflect rising expectations for quality, consistency, sustainability, and global-standard performance.

And this brings us to the theme of today — "Future-Ready by Design."

To be future-ready, we must acknowledge that the needs of modern India are no longer predictable or uniform. The kitchens and interiors we build must withstand diverse climates, higher usage, rapid lifestyle shifts, and sharper consumer scrutiny.

I recall a conversation with a family in Mumbai who had renovated their kitchen only a few years ago. Despite a well-planned design and good workmanship, the cabinets didn't survive the monsoon cycles. The material was simply not engineered for the environment it was placed in. And this is not an isolated story — nearly one-third of customer complaints in modular kitchens today can be traced back to material behaviour, not design or manufacturing.

This is where sustainability and innovation become central. Not as aspirations, but as imperatives.

Let us be future-ready — by design, by intention, and by leadership.

How Mr. Deendayal Daga Built a Timber Empire from ₹50,000* _



At 83, the Chairman of Archidply Industries Ltd. is still going strong — and his story reads like a masterclass in Indian entrepreneurship. With barely ₹50,000 in his pocket, he struck out alone. A transport company. Then a tea chest factory. Then a saw mill. Each step took him deeper into timber. In 1976 came the game-changer when Assam Timber Products was born at Rupai Assam. With a humble start, the company specialized in manufacturing tea chests, sawn timbers and veneer peeling. Mr Daga had a vision to create a business that would not only provide quality products but also contribute to the growth of the nation."

Deen Dayal Daga
Chairman
Archidply Industries Ltd

He took the leap by establishing his own Plywood unit with 1 Hot Press and Peeling Machine. Despite lacking capital and a balanced sheet, he overcame significant hurdles through perseverance, securing a bank loan for the business. His strong liaisoning and PR skills also earned the Forest Licence from Forest Officials.

Unbreakable resolve

In 1982, at just 40, he became the first from the sector to receive the Udyogpatra Award from the Vice President of India for his achievements as a Self Made Industrialist at the Institute of Trade And Industrial Development New Delhi.

Birth of a Brand

Archidply* That same year, he launched "Archidply" — Arch" for Architects, "id"- for Interior Designers. He traveled the length and breadth of India, setting up distribution and marketing when the terms barely existed in the trade. Dealers

dubbed him — the man who made plywood a household name.

Expansion Across India's Map

Between 1990-1995, he went on to set up 3 Face Veneering units in the hilly terrain of Arunachal Pradesh & Nagaland.

In 1995, he took over Mysore Chipboards, a leading manufacturer of particle boards. This acquisition enabled the company to expand the product portfolio and strengthen their position in the industry. They added plywood manufacturing capacity and entered into decorative veneer business from the same facility.

The Chairman's leadership and vision have been instrumental in driving the company's growth.

The 1996 Shock & The Comeback-In 1996, the Supreme Court ordered all factories within 100 km of forests to





shut. Overnight, the Assam unit closed. As President of the Assam Manufacturing Association and a certified lawyer, Mr Deendayal Daga was chosen to lead the industry's legal fight. While the case dragged on for years, he shifted machinery to Vishakhapatnam, which thrived, and successfully led the industry's efforts to challenge the NGT order passed by the Supreme Court, which threatened to ban plywood manufacturing."



In 1999, our Chairman was awarded the Swatantra Swarna Jayanti Udyog Vibhushan by Shri Ram Krishna Hegde, Honourable Minister Of Commerce at New Delhi for his outstanding contribution to the nation's economic development. This honor was a proud moment for our organization, and we continue to be inspired by his vision and leadership."*

In 2003, the industry won and the Assam unit restarted

However Mr Daga had already established a tea processing unit in Rupai, Assam, and in 2005, acquired the Bordhumsa Tea Garden in Arunachal Pradesh. These strategic moves enabled us to diversify our operations and leverage our expertise in the tea industry."**

In 2006, he took a significant step forward with the establishment of our Rudrapur facility. This state-of-the-art manufacturing unit spread across 15 acres enabled us to expand our product range to include plywood, laminates, and doors. With an annual capacity for plywood of 70 lac sq metre and annual capacity of laminates for 50 lac sheets, The facility has been a game-changer for our business, allowing us to cater to a wider market."

We took our business to the next level by expanding internationally. We strategically entered 20+ countries exporting laminates leveraging our expertise and quality products to gain a foothold in global markets.

2008: Archidply listed on NSE & BSE. The same year, he commissioned a cutting-edge Chintamani, Karnataka facility for veneers, plywood, and prelam boards –

In 2008, Archidply Industries Ltd. was successfully listed on the Bombay Stock Exchange (BSE) and National Stock Exchange (NSE). This milestone marked a new chapter in our journey, enabling us to access capital markets and further fuel our growth plans."

In 2008, we also commenced our 12.5 acres cutting edge facility in Chintamani Karnataka for manufacturing veneers, plywood and pre-laminated boards.

"In 2024, we formed a new subsidiary, Archidpanel



Industries Pvt. Ltd., at Sitarganj. This greenfield project spread over 25 acres will focus on manufacturing MDF and allied products, further expanding our product portfolio and strengthening our market position. The annual capacity of this unit is 75000 CBM.

Vice President of FIPPI

Mr Deendayal Daga has also been the Vice President of FIPPI (Federation of Indian Plywood & Panel Industry) and has played a pivotal role in shaping industry policies, setting quality standards, and fostering responsible growth.

As premier industry association, FIPPI unites manufacturers, suppliers, and stakeholders to build a strong, sustainable, and globally competitive plywood and panel industry. Our commitment to eco-friendly practices, technological advancements, and business development ensures a thriving future for the sector.

Unshakable at 83

Over the past 50 glorious years, our respected Chairman, Mr D Daga has played a pivotal role in establishing 10 state-of-the-art factories across India, spanning the Northern, Southern, and Eastern regions. To support this extensive network, a robust infrastructure has been created, comprising over 2000 dealers across 27 states, 17 sales offices, 9 strategically located warehouses, and a dedicated workforce of 1500 employees.



We remain deeply grateful to our Chairman and mentor, Mr. Deendayal Daga, whose visionary leadership and unwavering ethics have been the cornerstone of this organization. His dynamic approach was instrumental in elevating our brand to a legendary status, earning the trust of industry professionals and households nationwide. As we embark on this next chapter, we continue to value his invaluable guidance in our pursuit of future milestones. Today, from his Kolkata office, Mr D. Daga still manages the Assam tea factory. From a small transport enterprise to a listed company with a pan-India footprint, Mr Deen Dayal Daga's life is more than a business story. It's a reminder that ambition, when paired with resilience and people-first values, can build empires — and legacies. □



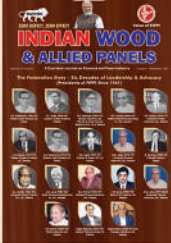
VOICE OF FIPPI

INDIAN WOOD & ALLIED PANELS

A QUARTERLY JOURNAL ON PLYWOOD
AND PANEL INDUSTRY

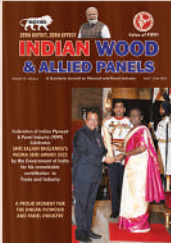


















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Covering the latest industry trends, policy updates, innovations, and
sustainability efforts in the plywood, wood & panel sector.

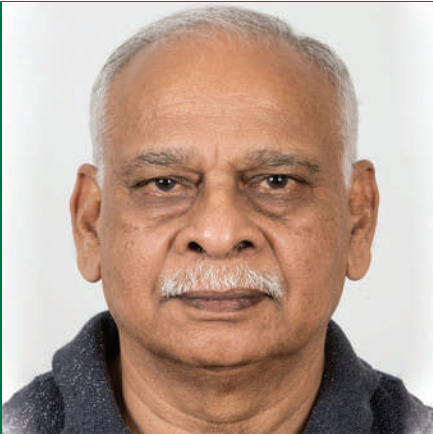
For more information, contact us at fippi@fippi.org





Building a Sustainable Future

Plantation Initiatives & Raw Material Sustainability



Ajay Baldawa
Executive Director
Century Plyboards (India) Limited



Sunil Shekhawat, Head of Manufacturing,
R&D and Technology-MDF & Particle Board
Century Plyboards (India) Limited

For decades, India's plywood and panel industry operated on a foundational tension: industrial demand meant pressure on natural forests, and forest pressure meant ecological decline. For farming communities living on the margins — dependent on rain-fed seasonal crops and vulnerable to volatile markets — the narrative was equally precarious.



Century Plyboards team and farmers during sapling distribution — Hoshiarpur, Punjab.

At Century Plyboards (India) Ltd., that old story is being rewritten. Through a bold, farmer-partnered plantation programme spanning seven states, the company has decoupled industrial sourcing from forest extraction — creating a supply chain that strengthens both ecosystems and rural economies.

32.69M+ Saplings Distributed (Hoshiarpur & Badvel)	38,197+ Acres of Land Covered	21,000+ Farmer Households Engaged
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A Pivotal Moment for India's Panel Industry

India's plywood and panel industry stands at a defining crossroads. As one of the world's major producers and

consumers of wood-based panels, India carries both an extraordinary opportunity and a profound responsibility — to demonstrate that industrial scale and ecological integrity can not only coexist but actively reinforce each other.

Global conversations around climate change, deforestation, and resource depletion are reshaping consumer preferences, regulatory frameworks, and investor expectations. The companies and industries that lead this transition will define the next era of manufacturing.

At Century Plyboards, sustainability is not a tagline — it is the operating philosophy that shapes every investment decision, every product developed, and the collective vision for the decades ahead.

Sustainability as a Core Value

Century Plyboards has taken a bold stance on sustainability by moving away from dependence on forest-derived timber. Today, over 95% of the timber processed at its Indian facilities is sourced from certified plantations, with a clear target of reaching 100% plantation-sourced timber — positioning Century Plyboards as one of the very few large-scale panel manufacturers in Asia to achieve full independence from natural forest timber.

This strategy is not only ecologically responsible but also ensures long-term supply chain stability. Century Plyboards is India's first company to launch a traceable MDF product, highlighting its dedication to transparency and accountability.

The Century Plantation Project: An Ecosystem of Growth

To address the twin goals of sustainable raw material sourcing and rural upliftment, Century Plyboards launched the Century Plantation Project. This initiative focuses on the scientific cultivation of high-yielding Eucalyptus and Poplar plantations across Hoshiarpur (Punjab), Badvel (Andhra Pradesh), and Guwahati (Assam).

The plantations are designed not merely as sources of industrial wood, but as community-centric projects that provide economic opportunities to farmers, promote agroforestry, and preserve ecological balance.



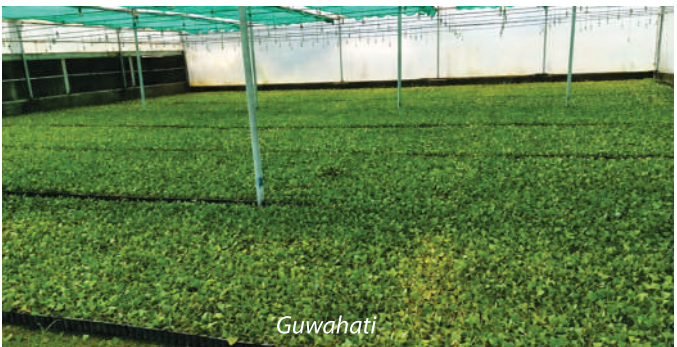
Nursery operations — sapling handover & Farmer receives clonal saplings for plantation.

Project Highlights

- **Clonal Saplings:** Genetically superior, disease-resistant clonal saplings developed for specific climatic and soil conditions.
- **Subsidised Supply:** Saplings provided to farmers at 50% subsidised rates.
- **Buyback Assurance:** Guaranteed buyback arrangement with Minimum Support Price (MSP), mitigating market risks.
- **Agroforestry Models:** Intercropping and biodiversity-enhancing practices are promoted across all programme sites.
- **Training & Extension Services:** Regular training sessions on planting, maintenance, and harvesting delivered to participating farmers.
- **Full Traceability:** 100% traceability system to track every tree from farm to factory.

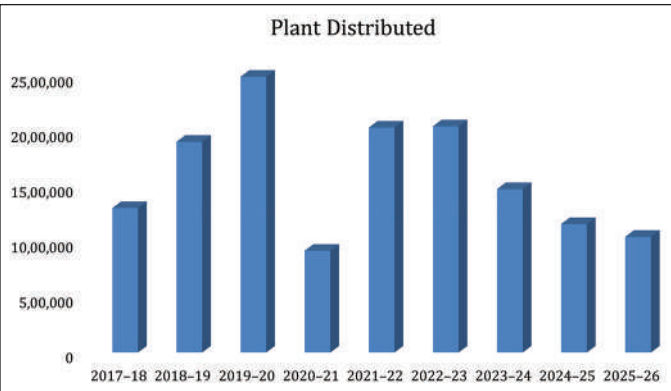
Plantation Programme — Impact Data

Across nine harvesting terms (2017–18 through 2025–26), the Hoshiarpur programme has collectively issued over 18,600 coupons to participating farmers, covering approximately 26,882 acres of cultivated land. More than 14.58 million saplings have been distributed and over 13.44 million plants successfully lifted — reflecting a strong field survival and harvest rate.



Hoshiarpur Plant — Punjab (Coupon-Based Farmer Engagement Model)

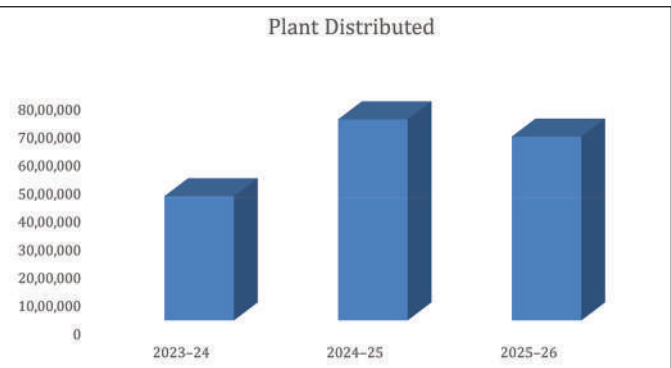
Year	Coupons/ Farmers	Plants Distributed	Area (Acres)
2017–18	1,509	13,08,908	2,618
2018–19	2,181	19,08,956	3,818
2019–20	3,283	24,98,660	4,997
2020–21	1,157	9,21,860	1,844
2021–22	2,792	20,37,990	4,076
2022–23	2,739	20,49,600	4,099
2023–24	1,988	14,80,220	2,960
2024–25	1,172	11,63,315	2,327
2025–26	1,031	10,48,047	1,878
Total	18,600+	1,44,17,556	26,882



Plants Distributed by Term — Hoshiarpur Programme (2017–18 to 2025–26)

Badvel Plant — Andhra Pradesh

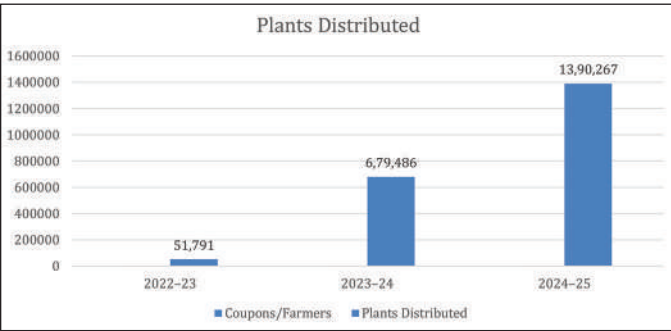
Year	Coupons/ Farmers	Plants Distributed	Area (Acres)
2023–24	1,052	44,15,785	2,760
2024–25	1276	71,49,975	4,469
2025–26	532	65,39,026	4,087
Total	2,860	1,81,04,786	11,316



Plants Distributed — Badvel, Andhra Pradesh

Guwahati Plant — Assam

Year	Coupons/ Farmers	Plants Distributed	Area (Acres)
2022–23	69	51,791	76
2023–24	161	6,79,486	1,008
2024–25	634	13,90,267	2,043
Total	1,324	24,60,563	4,248



Plants Distributed — Guwahati, Assam (Growing Programme)

Sustainable Forestry Practices

Century Plyboards adopts world-class silvicultural practices that ensure environmental balance and material reliability. Key practices include systematic reforestation, site-specific clonal selection matched to soil and climate conditions, regular thinning and maintenance interventions, and continuous farmer assistance from planting through to post-sale services.



Eucalyptus Plantation

The company integrates tree planting with traditional farming to enrich biodiversity and reduce monoculture dependence — and maintains a 100% traceability system to track every tree from farm to factory. These practices collectively sustain a resilient supply chain while protecting natural ecosystems.

Agroforestry: The Next Frontier for Farmer Partnerships

Building upon the success of the farm forestry programme, Century Plyboards is actively exploring an integrated agroforestry model as the next evolution in its farmer engagement strategy. Under this approach, timber

trees — such as Poplar and Eucalyptus — are intercropped alongside food and cash crops on the same landholding, enabling farmers to cultivate timber and agricultural produce simultaneously without sacrificing income from either.

This model significantly improves per-acre profitability for participating farmers while accelerating plantation expansion at scale. It also delivers measurable ecological co-benefits: improved soil health, reduced soil erosion, enhanced local biodiversity, and greater carbon sequestration per unit of land.

For Century Plyboards, an agroforestry-linked supply chain would further diversify the raw material base while deepening community benefit — making it one of the most impactful initiatives at the intersection of agricultural development, climate action, and sustainable supply chain resilience.

Farmer-Centric Development: A Social Dividend

Beyond environmental gains, the Century Plantation Project is transforming rural economies. Thousands of farmers — many of them smallholders — are now equipped with modern agroforestry skills, consistent income opportunities, and institutional support. Women are actively participating in nursery operations, while community-wide involvement in plantation care has improved cohesion and shared prosperity.

Marginal lands once considered unproductive have now become income-generating assets. The model has significantly reduced the economic vulnerability of participating families and has curtailed seasonal migration trends by ensuring stable, local employment.

Impact Through the Sustainable Livelihood Framework

The socio-economic transformation driven by the Century Plantation Project maps directly against the five core capitals of the Sustainable Livelihood Framework:

Livelihood Capital	Scenario BEFORE	Scenario AFTER
Natural Capital	Degraded, fragmented landholdings; rain-fed dependency; eroding topsoil and depleted soil fertility.	Improved soil fertility through structured agroforestry; enhanced water retention; expanded green cover.
Physical Capital	Low-tech agriculture; absence of irrigation support; poor access to quality planting material.	Access to high-quality clonal saplings; modern silvicultural tools and techniques; optimised irrigation guidance.
Financial Capital	Volatile low wages; lack of alternative income; seasonal agricultural debt cycles.	Diversified income from timber and crops; guaranteed buyback pricing; stable, elevated household earnings.
Human Capital	Minimal specialised skills; limited educational investment; low nutritional security.	Specialised agroforestry skills; stable household funds channelled toward education and nutrition.
Social Capital	Low social standing; weak community organisations; minimal collective voice.	Elevated standing through programme participation; active farmer groups and cooperatives at village level.



Farmer receiving coupon at Century MDF Hoshiarpur plant

Guarding Against Climate Uncertainty

The most profound benefit of the agroforestry design is its built-in resilience against climate instability — particularly for small and marginal farmers who operate on fragmented plots with minimal financial safety nets. While traditional crops can be wiped out by a single erratic monsoon or unseasonal flood, perennial timber trees are exceptionally sturdy.

On small-scale holdings, a mixed multi-species canopy acts as a natural biological shield, minimising catastrophic pest, disease, and insect outbreaks. If a seasonal food crop fails due to unseasonal weather, the smallholder’s standing timber remains fully secure — providing an emergency financial asset and an economic buffer that protects families from financial ruin or exploitative debt cycles.

Greener Manufacturing: Efficiency as Environmental Practice

Responsible sourcing must be matched by responsible production. Century Plyboards’ manufacturing operations are governed by a continuous improvement framework spanning energy, waste, and water — recognising that true



Rooftop solar installation at Century Plyboards manufacturing facility — driving renewable energy targets.

sustainability demands accountability at every stage of the value chain.

- **Biomass Energy:** Wood residues — sawdust, veneer offcuts, and bark — are channelled into biomass boilers, reducing fossil fuel dependence at key manufacturing plants. This circular use of process residues transforms waste into a clean, renewable energy asset.
- **Solar Power:** Rooftop solar installations contribute meaningfully to daytime energy requirements. Century Plyboards is actively expanding this capacity, targeting a 50% reduction in grid electricity consumption.
- **Zero Liquid Discharge (ZLD):** Advanced effluent treatment systems are being progressively upgraded to full Zero Liquid Discharge norms, eliminating wastewater outflows and safeguarding local water bodies.

- **Variable Frequency Drives (VFD):** Deployed across all motor-driven systems — fans, pumps, compressors, and conveyors — dynamically matching motor speed to actual process demand, delivering significant energy savings.
- **Electric Material Handling:** Fully electric-operated forklifts and cranes for all goods movement within factory premises, eliminating diesel and LPG emissions and reducing noise pollution.

Certifications: Standards as a Compass, not a Ceiling

Century Plyboards’ sustainability framework is supported by internationally recognised certifications and industry leadership. These achievements are important milestones, but not the destination — the company views certifications as frameworks for continuous improvement and as foundations for future sustainability innovations.

FSC® Certified Responsible forest sourcing — independent assurance	ISO 9001 / 14001 / 45001 Quality, environmental stewardship & occupational health	CARB Compliant Low-emission panel products meeting stringent international standards
IGBC Founder Member Indian Green Building Council — advancing sustainable construction		Green Leaf Award 2025 Platinum Award for green-belt development & biodiversity excellence

SCS Global Services does hereby certify that an independent audit has been completed and conformity to the applicable standard(s) has been confirmed for:

Century Plyboards (India) Limited

Village - Daulowai, Dasuya Road, Hoshiarpur, PB 144208, India

This single site certificate covers the production of wood panels using the transfer system.

The facility(s) are hereby Chain of Custody certified to sell products as:

FSC 100%; FSC Mix

The assessment has been conducted by SCS Global Services in accordance with the protocols of the Forest Stewardship Council® A.C. (FSC®).

FSC Standard: FSC-STD-40-004

Certificate Code: SCS-COC-006450

Trademark License Code: FSC-C143057

Valid from: 27 August 2023 Expiry date: 26 August 2028

This certificate itself does not constitute evidence that a particular product supplied by the certificate holder is FSC-certified or FSC Controlled Wood where applicable. Products offered, shipped or sold by the certificate holder can only be considered covered by the scope of this certificate when the required FSC claims are clearly stated on sales and delivery documents. The scope of this certificate is considered accurate on the date of issuance. The current validity and scope, including the full list of products, shall be verified on <https://info.scs.org>. The certificate shall remain the property of SCS, and this certificate and all copies or reproductions of this certificate shall be returned to SCS immediately upon request. Where a certificate covers more than one site, the covered products and processes activities are performed by the network of participating sites, and not necessarily by each of them.



The mark of responsible forestry



Maggie Schwartz, Vice President, Program Development
SCS Global Services
2000 Powell Street, 5th. 600, Emeryville, CA 94608 USA

Issued 27 Aug 2023



APEX INDIA FOUNDATION
RECOGNISING EXCELLENCE • SPREADING AWARENESS

Congratulations

Ref: Apex India/Green Leaf Award 2025/Goa

Date: 07/05/2026

Shri Sunil Shekhawat
Head – Technology, R&D & Manufacturing
Century Plyboards (I) Ltd.
Century MDF Prowud

**Sub: Congratulations!!! Selected for "Platinum Award" Under
Apex India Green Leaf Award 2025 for Green Belt Development**

Respected Sir,

We are highly delighted to inform you that the management of **Apex India Foundation**, on the recommendation of the highly experienced Jury Members, has distinguished **Century Plyboards (I) Ltd., Century MDF Prowud** as the recipient of the 'Platinum Award' under **Apex India Green Leaf Award 2025 for Green Belt Development in Building Materials Sector**.

We extend our heartfelt congratulations to your entire team for this well-deserved recognition. Your commitment to fostering a positive work environment, nurturing talent, and driving organizational growth sets a commendable example for others in the industry. Your innovative approaches and best practices serve as inspiration for continuous improvement and excellence in management.

We cordially invite you to receive this prestigious award on behalf of your organization at the **Apex India Award Ceremony** coupled with "**Apex India National Summit on EHS, ESG, Energy & Plastic Waste Management**" on **16th May 2026** at **Taj Cidade De Goa Heritage Hotel Goa (India)**.

The following Dignitaries have been invited to grace the Occasion:

1. Hon'ble Aleixo Sequeira, Minister of Environment, Captain of Ports, Law and Judiciary and Legislative Affairs, Government of Goa.
2. Hon'ble Sh. P.K. Saighal, (Retd.) Major General, Defence Expert of India & TEDx Speaker.
3. Hon'ble Dr. Avneesh Singh, Director General (Retd.) DGFASLI, Ministry of Labour and Employment, Govt. of India.

We extend an invitation for your company to be an integral part of this exceptional gathering and kindly request your consideration for sponsorship. We offer multiple advertising opportunities throughout this event, providing enhanced visibility for your organization. We are confident that your organization's steadfast commitment to the management and systems will yield sustainable benefits, elevating your organization's reputation and affording it greater recognition. We will expeditiously share comprehensive program details in due course.

Please confirm your attendance to ensure that we can make necessary arrangements for your participation.

Once again, congratulations on this well-deserved achievement, We look forward to celebrating your continued success and innovation in the years to come.

Best Wishes

President
Kuldeep Singh

Vision for the Future

Century Plyboards remains firmly committed to deepening and expanding its sustainable initiatives. Looking ahead, the company plans to:

- Extend plantation activities to new regions across West Bengal, Assam, Punjab, Haryana, and Uttar Pradesh.
- Experiment with diverse native and commercial species suited to varying regional climates.
- Launch digital platforms for real-time plantation monitoring and supply chain transparency.
- Collaborate with academic and government institutions for R&D in sustainable forestry.
- Develop frameworks for carbon credit generation linked to plantation networks.
- Scale the agroforestry model to achieve 100% plantation-sourced timber across all facilities.

A Blueprint for Sustainable Industrialization

The success of Century Plyboards' initiatives proves a vital point: corporate environmentalism does not have to be an expensive charitable expense. Instead, it can be seamlessly woven into the core operational design of a manufacturing company.

By partnering directly with farming communities, collaborating with State Social Forestry Departments, and integrating sustainability into every function from procurement to production, Century Plyboards has built an integrated, mutually beneficial model. The factory gets its wood; the farmer gets financial security; the planet gets carbon-sequestering green cover.

As industries globally face pressure to decarbonise and embrace social equity, Century Plyboards stands as an excellent blueprint. By nurturing its supply chain from the roots up, the company is proving that true profitability is found when industrial growth directly empowers the communities that sustain it.

"The choices our industry makes today will shape the world of tomorrow. Together, through innovation, responsibility, and collective commitment, we can build not only better products — but a better future for generations to come."

— Century Plyboards (India) Ltd. □

A NATIONWIDE MESSAGE BY FIPPI IN THE "TIMES OF INDIA" ACROSS ALL EDITIONS, HIGHLIGHTING THE TRANSFORMATIVE IMPACT OF QCOs

THE TIMES OF INDIA

CELEBRATING ONE YEAR OF IMPLEMENTATION OF QUALITY CONTROL ORDERS (QCOs) ON PLYWOOD & PANEL PRODUCTS

"Let us resolve to improve the quality of whatever we manufacture"

MAKE IN INDIA

ZERO DEFECT, ZERO EFFECT

INDIAN WOOD PANEL INDUSTRY

expresses its deepest gratitude to the Hon'ble Prime Minister, Shri Narendra Modi, for inspiring the industry towards manufacturing quality products.

Federation of Indian Plywood & Panel Industry (FIPPI), along with its 20 regional associations, 10 lakh farmers, and 10 lakh carpenters & woodworking entrepreneurs, thanks the Hon'ble Minister of Commerce and Industry, Shri Piyush Goyal, for the implementation of QCOs on Plywood, MDF, Particle Board, and Wooden Flush Door Shutters. This visionary reform has brought the following transformations in the industry:

- Market is increasingly aware of the quality of plywood and panel products.
- Domestic production has risen 15%, driven by import substitution and increased consumer confidence.
- Compliance has significantly improved, with domestic licensed manufacturing units increasing from around 800 prior to implementation to over 2,400 currently.
- Quality improvement is becoming essential even for small manufacturers.
- Smaller factories are proactively exploring branding and market-positioning strategies.
- Driving the formalization of the previously fragmented sector, boosting government tax revenues.
- Through economies of scale, domestic manufacturers have absorbed rising input costs, ensuring price stability for consumers.
- Growing demand for standardized wood panels has enabled domestic producers to operate near installed capacity and has attracted over 3,600 crore in capacity expansion investments.
- Increased production supports agroforestry-based timber markets, boosting incomes for over 10 lakh farmers. Contributing to India's NDC goal of a 2.5-3 billion tonnes CO2 carbon sink by 2030 through sustainable tree cultivation.
- Increased production is reinforcing employment generation across the sector, strengthening rural and semi-urban economic ecosystems.
- Directly supporting over 10 lakh carpenters and woodworking entrepreneurs registered under the PM Vishwakarma Scheme 2023, ensuring superior craftsmanship.
- Even Original Equipment Manufacturers (OEMs) are partnering with local factories for consistent supply of quality panels instead of importing.
- Demand for E1 formaldehyde-compliant boards is growing steadily.
- Demand for quality control staff and job opportunities is rising across the sector.



Greenply's Sustainable Initiative: Driving Socio-Economic Upliftment of Rural India



Jinendra Kumar Jain
Senior Sustainability Advisor, FIPPI
National Head, Greenply Industries Ltd.

For decades, the global wood panel and commercial timber industries have operated under a cloud of ecological anxiety. The formula always seemed zero-sum: industrial demand meant deforestation, and deforestation meant environmental degradation. For the smallholder farmers living on the fringes of India's economic growth, the narrative was equally bleak. Bound to rain-fed seasonal agriculture, vulnerable to erratic monsoons, and trapped in low-wage cycles, rural families faced a precarious existence characterized by depleted soil and volatile crop prices.

But in pockets across seven Indian states, a quiet green revolution is turning this old narrative on its head.

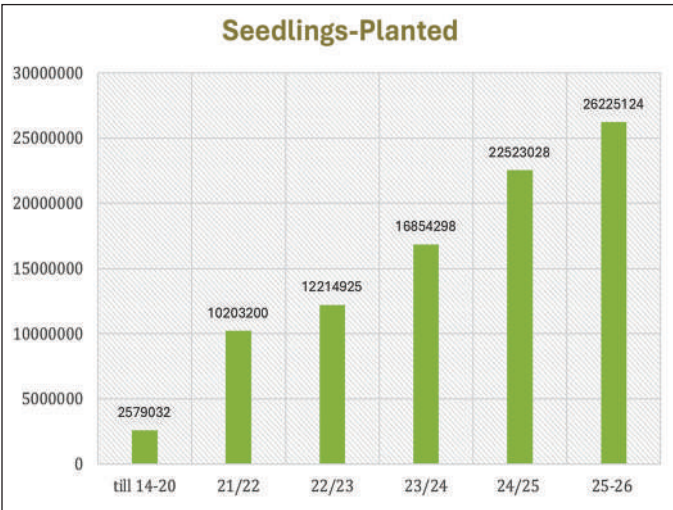


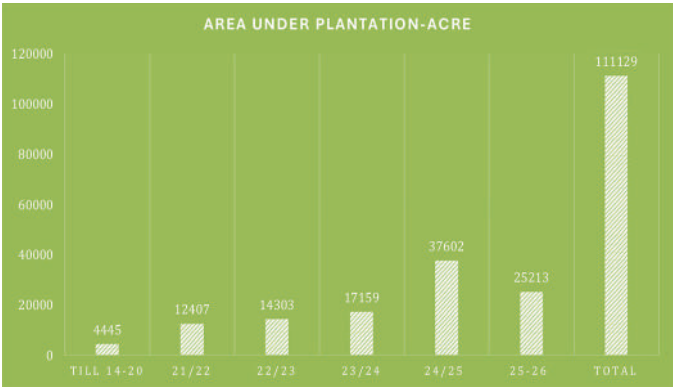
Greenply Industries Limited, one of India's foremost interior infrastructure brands, has rolled out a massive, institutional Farm Forestry Program. By treating smallholder farmers not as mere suppliers, but as core partners in a circular ecosystem, the company has successfully decoupled industrial sourcing from environmental exploitation. The results are visible on the ground: degraded wastelands are transforming into vibrant, income-generating woodlots, and thousands of rural families are moving from subsistence to long-term financial stability.

The Scale of the Green Canopy

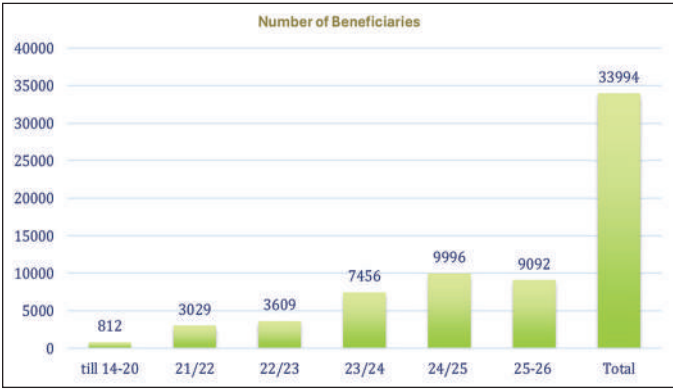
Greenply's sustainable forestry model is vast in scope, spanning Odisha, West Bengal, Andhra Pradesh, Nagaland, Gujarat, Rajasthan, and Uttar Pradesh. To date, the numbers speak volumes about the corporate commitment behind the initiative:

- **90+ Million Seedlings** distributed and planted across target geographies.
- **Over 1.1 Lakh (110,000) Acres** of land successfully greened and brought under restorative cultivation.





- **More than 33,000 Farmers and Rural Households** directly integrated into the commercial agroforestry program.



Rather than buying up massive tracts of land for corporate plantations, Greenply chose the path of participatory farm forestry. The company encourages rural communities to adopt structured agroforestry models, planting commercial trees alongside traditional food crops. This approach solves two crises simultaneously: it secures a sustainable, domestic

supply of raw materials for Greenply's plywood and panel factories, while creating a resilient, long-term source of wealth for small-scale agrarian families.



The Science of Biodiversity: Moving Beyond Monoculture

Critics of commercial forestry often point out the ecological hazards of monoculture—vast swathes of a single tree type that strip nutrients from the soil and lay the land bare to catastrophic pest outbreaks. Greenply has countered this risk by introducing more than 18 distinct plantation species, meticulously selected based on regional soil types, climatic zones, and specific industrial applications.

In the humid, mountainous terrains of Tizit, Nagaland, Greenply manages an extensive network of plantations utilizing species like *Melia dubia* (Malabar Neem), *Eucalyptus globulus*, *Bombax ceiba* (Semal), *Anthocephalus cadamba* (Kadam), *Ailanthus excelsa*, *Swietenia mahagoni* (Mahogany), *Duabanga sonneratioides*, and *Canarium resiniiferum*.

Meanwhile, in the semi-arid belts of Western India, under Greenply Specialty Panels Private Limited in Savli, Vadodara (Gujarat), the focus shifts to drought-resilient, fast-growing varieties. Here, plantations thrive with *Eucalyptus camaldulensis*, *Leucaena leucocephala* (Subabul), *Dendrocalamus strictus*, *Bambusa arundinacea* (Bamboo), and *Melia dubia*.

By maintaining high-tech clonal production centers and advanced nurseries, Greenply supplies high-quality planting materials straight to fields. The company collaborates with top agricultural and forestry universities to transition laboratory breakthroughs in tissue culture and yield optimization straight to the field.



The Gold Standard: Global Certifications

The company directly manages more than **4,000 hectares of Forest Stewardship Council – Forest Management (FSC-FM)** certified plantations. These tracts strictly comply with rigorous international criteria regarding biodiversity preservation, workers' rights, and restricted chemical use. The company's plantation networks operate under stringent global management frameworks:

- **SCS-FM/COC-007306:** Certifies Greenply Industries Limited's plantation groups in Tizit, Nagaland, as an officially recognized Well-Managed Group of Plantation Forests.



- **SCS-FM/COC-009824:** Validates the operations of Greenply Specialty Panels in Savli, Vadodara, Gujarat, as meeting all international FSC Principles & Criteria for Well-Managed Plantations.



To guarantee end-to-end transparency, Greenply holds **FSC-Chain of Custody (CoC)** certifications across its major manufacturing units in **Vadodara, Rajkot, Tizit, and Kriparampur**. This setup guarantees that every piece of timber entering a Greenply factory can be tracked directly back to a responsibly managed farm or forest plantation.

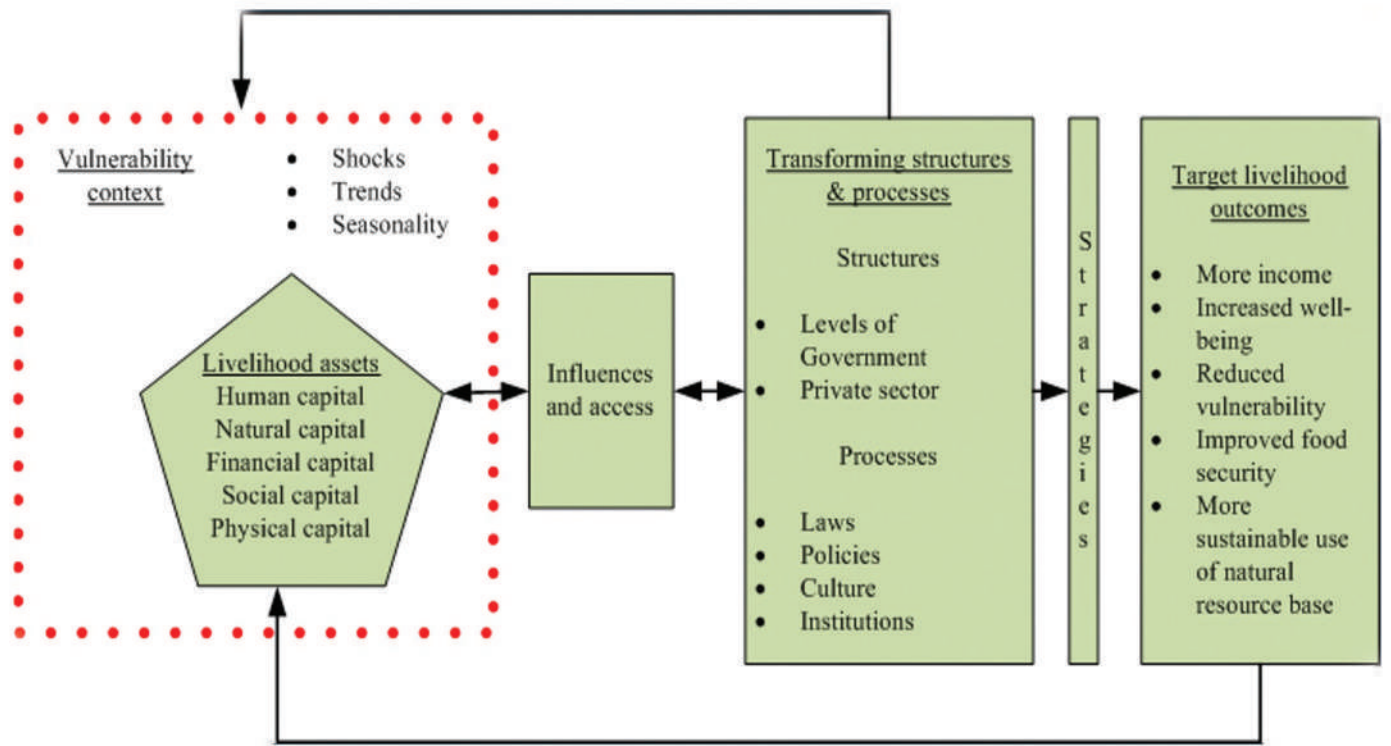
Socio-Economic Upliftment: Building Stronger Communities

While the environmental impact of 90 million trees is profound, the human element of Greenply’s initiative is where the true transformation lies. To evaluate the socio-economic impact of the program, researchers map its outcomes against the Sustainable Livelihood Framework, analyzing how it alters the five core capitals—Natural, Physical, Financial, Human, and Social—of a rural community.

The contrast between the ‘Before’ and ‘After’ scenarios paints a vivid picture of structural rural empowerment:

Livelihood Capital	Scenario BEFORE the Project	Scenario AFTER the Project
Natural Capital	Small, degraded landholdings; nutrient-depleted wastelands; entirely rain-fed dependency with eroding topsoil.	Improved soil fertility through structured leaf litter decomposition; significantly enhanced water holding capacity across fields.
Physical Capital	Absence of irrigation facilities; low-tech agricultural tools; poor quality or counterfeit seeds and saplings.	Optimized irrigation requirement management; improved silvicultural techniques; seamless access to high-tech clonal clones and tools.
Financial Capital	Volatile, low daily wages; lack of alternative income-generating activities; deep cycles of rural institutional debt.	Diversified income streams via agroforestry; guaranteed buyback pricing at factory gates; highly stable, elevated household income.
Human Capital	High rates of malnutrition; substandard healthcare access; minimal specialized technical or farming skills; low education.	Enhanced nutritional security; steady household funds allocated for higher education; development of specialized agroforestry skills.
Social Capital	Low social standing; weak kinship and community trust; zero formal or informal agricultural organizations.	Elevated social standing; creation of vibrant, active Village Organizations; high mutual trust and strong local kinship.

SUSTAINABLE LIVELIHOOD FRAMEWORK





One of our progressive Partner, under farm Forestry plantation Program, Shri Dinesh Bhai Patel from Antroli, district Kheda, honoured by the hon'ble Chief minister of Gujarat on world Forestry day for exceptional Plantation work on 200 Acres on 21.03.2023

Guarding Against Uncertainty:

The most profound benefit of Greenply's agroforestry design is its built-in resilience against climate instability, particularly for small and marginal farmers. These smallholders, operating on small, fragmented plots with minimal financial safety nets, are historically the most vulnerable to environmental and macroeconomic shocks. While traditional agricultural crops are highly fragile—where a single erratic monsoon, a prolonged drought, or a flash flood can completely wipe out a family's entire seasonal earnings—perennial timber trees are exceptionally sturdy. They withstand extreme weather events far better than annual field crops.

Additionally, on small-scale holdings, a mixed multi-species canopy acts as a natural biological shield, minimizing catastrophic pest, disease, and insect outbreaks. If a seasonal food crop fails due to unseasonal weather, the smallholder's standing timber remains fully secure, providing an emergency financial asset and an economic buffer that protects the family from financial ruin or exploitative debt cycles.

A Blueprint for Sustainable Industrialization

The success of Greenply's initiatives proves a vital point for corporate India: corporate environmentalism does not have to be an expensive charitable expense. Instead, it can be seamlessly woven into the core operational design of a manufacturing company.

By collaborating directly with State Social Forestry Departments and partnering with top agricultural and forestry universities to transition scientific discoveries to the field, Greenply has built an integrated, mutually beneficial model. The factory gets its wood; the farmer gets financial security; the planet gets carbon-sequestering green cover.

As industries globally face pressure to decarbonize and embrace social equity, Greenply Industries Limited stands out as an excellent blueprint. By nurturing its supply chain from the roots up, Greenply is proving that true profitability is found when industrial growth directly empowers the communities that sustain it.





સામાજિક વનીકરણ રેંજ, સંખેડા
સામાજિક વનીકરણ વિભાગ, વડોદરા
મુ. સંખેડા તા. સંખેડા જ. છોટાઉદેપુર
Email: rfosankehda@gmail.com



Ref. No.: C/19/2025-26

Date: 26/07/2025

To
The Management Team
Greenply Industries Ltd.
Savli Plant, Vadodara

Subject: Letter of Thanks and Appreciation

Respected Sir,

On behalf of the Social Forestry Range, Sankheda, I express my sincere gratitude to Greenply Industries Ltd. for organizing the farmers' meeting at Bodeli and providing us with the opportunity to participate in this meaningful event.

Your initiatives in promoting eucalyptus plantation, carrying out plantation work in Bodeli, and ensuring the procurement of eucalyptus wood from local farmers are praiseworthy. These efforts are contributing not only to the livelihoods of the rural farming community but also to increasing the region's green cover.

We highly appreciate the technical support offered by your team, the valuable engagement with farmers, and the transparent discussions on your company's vision and plans. These interactions have been truly beneficial for the participants and will positively influence sustainable agroforestry in the area.

The Social Forestry Range, Sankheda, conveys its blessings and best wishes to Greenply Industries for its future endeavors in environmental conservation and rural development.

With warm regards,
Yours sincerely,


(N. T. Bariya)
Range Forest Officer (RFO)
Social Forestry Range, Sankheda
Forest Department, Government of Gujarat

DUROPLY® Sustainability: Plantation Initiatives of the Industry



Almost every material used in construction is extracted from the earth — concrete from quarried limestone, steel from mined iron ore, aluminium from bauxite. Wood is the exception. It is the only major building material that can be grown, and the only one that removes carbon dioxide from the atmosphere as it is produced. The sections that follow set out, point by point and with supporting data, why responsibly sourced wood is the most sustainable material available to the construction sector — and the part the panel industry, including Duroply Industries Limited, plays in sustaining it.

Jaydeep Chitlangia
Senior Vice President, FIPPI and
Mentor, Duroply Industries Ltd.

1. A material that stores carbon

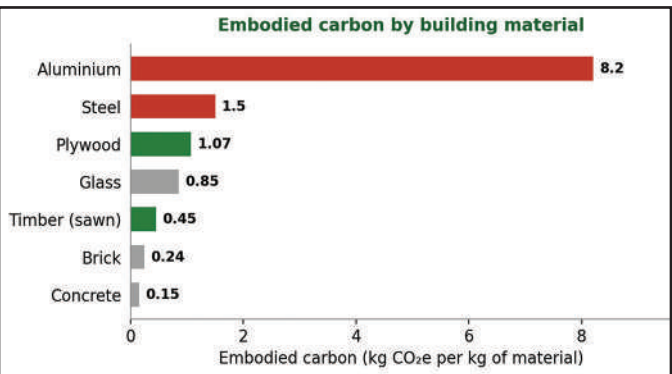
As a tree grows, it absorbs carbon dioxide through photosynthesis and stores the carbon within its wood. Approximately half the dry weight of wood is carbon, and that carbon remains held in place for as long as the wood endures — whether in a forest, a floorboard or a sheet of plywood. By the time a finished wood product is installed in a building, the tree from which it came has already removed a substantial quantity of carbon dioxide from the atmosphere.

≈ 0.9 t	of CO ₂ is stored in a single cubic metre of wood (typical density)
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For this reason, climate scientists recognise harvested wood products as a genuine carbon store rather than a waste stream. The longer a product remains in use, the longer the carbon it contains is kept out of the atmosphere.

2. The lowest-emission way to build

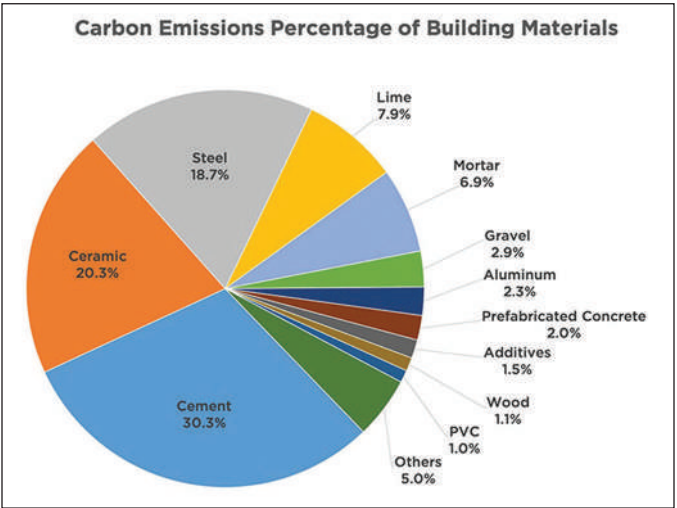
The materials that wood commonly replaces are among the most carbon-intensive in the world. Cement alone



Source: Inventory of Carbon & Energy (ICE) v3.0, Hammond & Jones, University of Bath (2019). Values exclude the carbon stored within the wood itself.

accounts for roughly 8 per cent of global carbon dioxide emissions, iron and steel for a further 7 to 8 per cent, and aluminium for approximately 2 per cent — together, close to one-sixth of the global total. Producing an equivalent mass of wood generates only a small fraction of those emissions, as the charts below illustrate.

Wood also offers an advantage that no competing material can match. The figures above account only for the energy required to manufacture each material; wood additionally carries the carbon dioxide that the tree has already absorbed. Once this is taken into account, its carbon balance becomes net-negative.



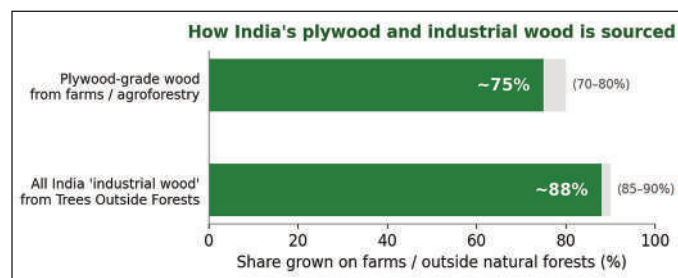
3. Grown, not extracted

Concrete requires limestone quarries, steel requires iron-ore mines, and aluminium requires both bauxite mines and very large quantities of electricity. A tree requires only sunlight, rainwater, soil and the carbon dioxide already present in the air; and when it is harvested, another is planted

in its place. Wood is the only structural raw material that is genuinely renewable and that regenerates the very resource it consumes.

4. Cultivated by farmers, not taken from forests

A common misconception holds that plywood production drives deforestation. In India, the position is now the opposite. The majority of plywood-grade wood is cultivated by farmers — poplar, eucalyptus and melia grown on field boundaries, marginal land and short-rotation plantations — rather than harvested from natural forests. An estimated 70 to 80 per cent of the wood used for plywood, and 85 to 90 per cent of all industrial wood in India, is now sourced from these “Trees Outside Forests.”



Source: National Agroforestry Policy (2014); ICFRE; Forest Survey of India, India State of Forest Report 2023. Indicative ranges.

This delivers two benefits simultaneously. It allows natural forests to remain undisturbed, and it establishes trees as a valuable cash crop for rural households — part of a forestry sector that supports the livelihoods of millions of farming families across India. In effect, sustained demand for farm-grown wood gives farmers a lasting incentive to plant and maintain trees.

5. Carbon kept in storage for longer

This is the consideration that matters most for emissions. When a tree dies and decays — or is burned — the carbon it has stored is released back into the atmosphere. When the same wood is converted into a door, a piece of furniture or a panel, that carbon remains held within the product throughout its service life. The IPCC reflects this through carbon “half-lives” of approximately 25 years for wood panels and 35 years for sawn timber. The principle is straightforward: the better made and longer lasting the product, the longer its carbon remains stored rather than returned to the air.

6. Engineered wood: a twofold benefit for the climate

Engineered panels such as plywood perform two climate functions at once. First, they continue to store the carbon held within the wood. Second, they replace steel, aluminium and concrete that would otherwise have been manufactured — and would have emitted carbon dioxide — in their place. A comprehensive review of dozens of studies found that, on average, approximately 2.1 tonnes of carbon emissions are avoided for every tonne of carbon stored in wood used in place of these materials. Engineered wood also yields

considerably more usable product from each log than sawn timber, allowing the same number of trees to go further. By both storing carbon and displacing emissions, engineered wood delivers a twofold environmental benefit.

7. Duroply's commitment

For a manufacturer, sustainability must be demonstrated rather than merely asserted. As one of India's oldest panel manufacturers, Duroply Industries Limited grounds this commitment in independent, third-party certification and responsible sourcing:

- **ISO 14001:** an independently audited environmental-management system that holds the company's operations to measurable environmental objectives.
- **Low-emission panels (E1 / CARB):** formaldehyde emissions maintained within stringent health limits, ensuring the product is safe for use in the home.
- **Farm- and plantation-based sourcing:** active support for the agroforestry supply chain that keeps natural forests intact while providing income to farming communities.

The conclusion is consistent across every measure considered here: to choose certified, plantation-based plywood is to choose a material that stores carbon, requires neither mine nor quarry, and supports the farmers who cultivate it — a sound and genuinely sustainable foundation on which to build.

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ROOTED IN ACTION, GUIDED BY NORMS, FIPPI'S PATH TO SUSTAINABILITY

Norms to Attain Sustainability

FIPPI is in the process of adopting comprehensive Sustainability Norms to secure a self-sustaining, renewable future for plywood & panel industries through structured agroforestry plantations.

Product Type	Yearly Production and Timber Requirement						Minimum Plantations / Year	
	Production (CBM)	Wood Req. (MT)	Productivity (MT/Acre)	Felling Rotation (Yrs)	Spacing (M x M)	Plants / Acre	Area (Acres)	Total No. of Plants
Plywood	10,000	20,000	50	6	3 x 3	450	400	180,000
MDF	10,000	17,000	40	3	2 x 2	1,000	425	425,000
Particle Board	10,000	13,000	40	3	2 x 2	1,000	325	325,000



It takes two to tango. Action TESA & Indian Farmers' Power Future of Sustainability Through Scientific Plantation Management



Rajeshwar Nair
Project & Plant Head
Action TESA

Most brands treat sustainability merely as a corporate responsibility, but at Action TESA, it is an integral part of the business. The company strongly believes that every sapling planted today will help create a better environment, a stronger economy, and a more sustainable society tomorrow.

At Action TESA, every sapling is seen as more than just a tree – it is an opportunity to create livelihoods and long-term value. Through a highly successful scientific eucalyptus plantation program, the company is empowering India's farmers to create lasting wealth while building a sustainable raw material ecosystem that meets the environmental standards of the Indian furniture industry.

India's wood-based industries face a structural paradox: demand is accelerating while supply remains ecologically constrained. Urbanization, infrastructure expansion, and rising furniture consumption have pushed the requirement for wood in plywood, MDF, particle board, and panel manufacturing to a critical threshold. Today, nearly 90-95% of the industry's wood requirement is sourced from agroforestry plantations cultivated by farmers, which substantiates long-term growth of the sector.

Recognizing this need, Action TESA has placed farmer-led scientific plantation forestry at the centre of its raw material model, with the conviction that the future of India's plywood and panel industry depends on productive, farmed forests rather than diminishing natural reserves.

The Program & Benefits

Supply high-yield clonal planting material, provide technical guidance, guide them do great plantation management thru farmer engagement programs and help farmer's transit from traditional boundaries to scientifically managed block plantation and intensive silviculture system.

Benefits:

- Sustainable industrial wood production
- Improved farmer income and livelihood security
- Increased green cover outside forests
- Enhanced carbon sequestration
- Reduced pressure on natural forests
- Long-term environmental sustainability

Landmark Sustainability Achievements (More Than 2 Crore Saplings Planted)

Action TESA has facilitated the plantation of more than 2 crore saplings across approximately 20,000 acres of farmland, working primarily with very small and marginal farmers. All plantation and distribution activities are digitally verified through Aadhaar-based authentication, ensuring full transparency and traceability across the supply chain.

Sapling distribution extends beyond the company's direct network - local nurseries and ancillary channels are engaged to encourage wider adoption of plantation forestry across the catchment region.

• Promoting Scientific Block Plantation & Empowering Farmers

To empower farmers and maximize the potential of farm forestry, Action TESA has developed a systematic and scientific approach to eucalyptus cultivation. The company has encouraged a shift from traditional low-density boundary plantations to scientifically managed block plantations, which deliver significantly higher productivity per acre and materially better returns for growers.

At the heart of this initiative is a dedicated team of forestry professionals who maintain continuous engagement with farmers through regular field visits, demonstrations, and technical guidance. Operating across Uttarakhand and Uttar Pradesh—including Udham Singh Nagar, Nainital, Pilibhit, Bareilly, Shahjahanpur, Hardoi, Sitapur, and Lakhimpur—



Encouraged farmers to move away from low-density boundary plantations to scientifically managed block plantations

the team provides end-to-end support, from site selection and plantation planning to harvesting and marketing, ensuring farmers realize the full value of their investment.

Promoting Scientific Silviculture Practices to improve productivity:

- o Site selection and land preparation
- o Optimum spacing and plantation geometry
- o Agroforestry & intercropping recommendations
- o Fertilizer and nutrient management
- o Irrigation planning and moisture conservation
- o Weed management and intercultural operations
- o Pest and disease monitoring
- o Pruning, thinning, and plantation maintenance
- **Site-specific Clonal Development and Selection**
Action TESA’s silvicultural approach is built on a single operating principle: “Right Clone for the Right Site. Before any planting material is recommended, technical experts assess soil characteristics, moisture

availability, and agro-climatic conditions. The outcome is a site-specific clone prescription that maximizes growth performance and minimizes plantation risk.

Scientific silviculture practices promoted across all farms include optimum spacing and plantation geometry, agroforestry and intercropping recommendations, fertilizer and nutrient management, irrigation planning and moisture conservation, weed management, pest and disease monitoring, and pruning, thinning, and plantation maintenance.

• **Empowering Farmers Through Scientific forestry State of the Art Clonal Production centre for Industrial Scale production**

To sustain large-scale plantation programs, Action TESA operates a state-of-the-art Hi-Tech Clonal Production Center (CPC) in Sitarganj, Uttarakhand. The facility features a 5,000 m² Mother Plant area and a 1,925 m² mist chamber equipped with automated sprinklers, enabling the production of over 7 million (70 lakh) clonal saplings annually.



- **Mother Plants:** Our 5000 m² mother plant area provides quality raw material for clonal production.



- **Six Mist Chambers:** Covering 1925 m², these chambers produce 70 lakh clones annually.





- **Hardening Chamber:** With a capacity to hold 4 lakh clonal saplings, ready for distribution to farmers.

• **Direct Farmer Connectivity**

Saplings are supplied to farmers at subsidized rates, with a doorstep delivery system that ensures planting material reaches farms directly - reducing logistical barriers, particularly in remote rural areas.

• **Technology-enabled Sustainability**

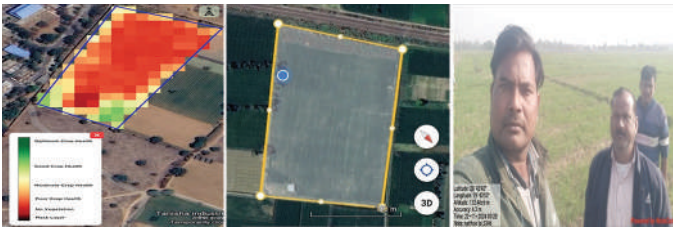
Action TESA is deploying digital infrastructure to make plantation forestry more accountable and farmer-accessible. A dedicated toll-free helpline provides farmers with real-time information on wood procurement rates and plantation support services.

A geotagging system enables accurate plantation



- **Open Nursery:** With a capacity to hold 40 lakh clonal saplings, ready for distribution to farmers.

monitoring and documentation - building a verifiable database for sustainability reporting, impact assessment, and data-driven decision-making.



Upgraded Kalpa Taru Plantation App will integrate plantation management, technical advisory, monitoring, and farmer engagement into a single digital platform - covering the full cycle from sapling planting to wood harvesting.



Expanding the Sustainability Model: The Vizag Initiative

Action TESA is about to add to its production capacity with a new state-of-the-art plant in Visakhapatnam. Equipped with advanced automation, strategically located, and backed by Action TESA's expertise but that is not all, it will be consistent with the company's philosophy of integrating environmental stewardship into industrial growth from the ground up, plantation activities in the surrounding regions were initiated immediately after the ground breaking ceremony - engaging local farming communities before the plant itself is operational.

the company to ecological restoration, carbon sequestration, and sustainable rural development in Andhra Pradesh over the long term.

Creating Shared Value System

The 4-year plantation lifecycle produces 20 billion tons of sustainable wood yield. Farmers sell this harvested wood directly to market - converting biological output into financial capital that materially transforms rural livelihoods.

The broader impact of this model is compounded across multiple dimensions: higher wood productivity per acre, greater adoption of sustainable agroforestry practices,



The Vizag project represents a replicable model: sustainable raw material ecosystems are built in parallel with manufacturing capacity, not as an afterthought. It commits

enhanced industrial wood availability, increased tree cover outside forests, and measurably reduced pressure on natural forest resources.

Sustainable wood yields generate direct farmer wealth



As Action TESA expands its plantation initiatives nationally, the operating thesis remains consistent: industrial growth and ecological responsibility should exist simultaneously for a greener future.□



Building a Sustainable Future: Greenpanel's Journey Towards Responsible Growth



Purushottam Sharma
Head-Product Development & Research,
Greenpanel Industries Ltd.

Sustainability at the Core of Greenpanel's Vision

As India's largest manufacturer of wood panels, Greenpanel Industries Limited firmly believes that sustainable growth and environmental stewardship go hand in hand. In today's rapidly evolving industrial landscape, businesses are expected not only to deliver quality products but also to operate responsibly and contribute positively to society and the environment.

At Greenpanel, sustainability is deeply embedded in our vision and operational philosophy. Our commitment extends far beyond manufacturing world-class MDF and plywood products. It encompasses responsible sourcing of raw materials, promotion of sustainable plantations, conservation of natural resources, reduction of carbon emissions, and continuous innovation to create a greener future for generations to come.

Promoting Sustainable Plantation and Agroforestry

One of Greenpanel's most impactful sustainability initiatives is its strong focus on agroforestry and farm forestry development. By encouraging farmers to cultivate fast-growing plantation species such as eucalyptus and other suitable timber crops on marginal and underutilized lands, Greenpanel helps build a sustainable wood resource base while creating additional income opportunities for rural communities.

Over the years, the company has distributed millions of high-quality saplings and provided technical support along with scientific plantation guidance to farmers. This initiative not only reduces dependence on natural forests but also contributes significantly to carbon sequestration, soil conservation, and rural economic development.

The company has supported more than 16,600 farmers in Andhra Pradesh and over 6,000 farmers in Northern India through its plantation initiatives.

In Southern India, particularly in Andhra Pradesh, around 71,000 acres of land have been brought under plantation, while approximately 30,000 acres have been developed in Northern India through Greenpanel's agroforestry programs.

Greenpanel has also successfully developed and distributed high-yielding, drought-resistant eucalyptus clones such as Clone-7 and Clone-316. These clones are propagated in-house through advanced clonal propagation techniques to ensure better productivity and sustainability.

The success of these programs demonstrates how industry and agriculture can effectively collaborate to create a circular and sustainable wood ecosystem.

Responsible Sourcing and Forest Stewardship

Greenpanel remains committed to responsible procurement practices and supports internationally recognized standards of forest management and chain-of-custody systems. The company promotes traceable and legally sourced raw materials, ensuring environmental and social responsibility throughout the supply chain.

By prioritizing plantation-grown timber and certified sourcing practices, Greenpanel actively contributes to the preservation of natural forests while meeting the increasing demand for wood-based panel products.

Sustainable Manufacturing Practices

Greenpanel continuously invests in advanced manufacturing technologies designed to improve operational efficiency while minimizing environmental impact.

Key sustainability initiatives include:

- Efficient utilization of wood resources through optimized production processes.
- Increased adoption of renewable and biomass-based energy systems.
- Reduction in water consumption through recycling and reuse practices.
- Installation of energy-efficient equipment and process optimization technologies.
- Responsible waste management focused on maximizing resource recovery and minimizing landfill disposal.

These initiatives have enabled the company to enhance





productivity while maintaining high environmental standards across its manufacturing operations.

Green Products for a Sustainable Tomorrow

Greenpanel's product portfolio reflects its strong commitment to sustainability and innovation. The company manufactures environmentally responsible MDF and Plywood products that comply with stringent quality and safety standards.

Directly and indirectly, Greenpanel promotes new plantations every year by supporting approximately 1 crore saplings in Andhra Pradesh and around 30 lakh saplings in Northern India.

All Greenpanel products are developed using low-emission technologies that support healthier indoor environments and contribute to green building initiatives. Continuous investments in research and development enable the company to improve product performance while reducing environmental impact.

Supporting Climate Action

Wood-based panel products play a significant role in climate mitigation by storing carbon throughout their service life. Through sustainable plantation development, responsible manufacturing, and long-life wood products, Greenpanel actively contributes to reducing the carbon footprint of the built environment.

The company's emphasis on renewable energy, resource efficiency, and sustainable raw material sourcing further strengthens its contribution toward national and global

climate goals.

Empowering Communities & Creating Shared Value

At Greenpanel, sustainability goes beyond environmental responsibility. The company actively engages with local communities through livelihood development, educational support, skill-building initiatives, healthcare programs, and rural development activities.

By creating opportunities for farmers, employees, business partners, and local communities, Greenpanel continues to generate shared value and promote inclusive growth.

The Road Ahead

As the MDF, plywood, and wood panel industry continues to evolve, Greenpanel remains committed to driving sustainable innovation and responsible growth. Through continuous investments in plantation development, green manufacturing technologies, renewable energy, and environmentally responsible products, the company aims to further strengthen its position as a sustainability leader in the wood panel industry.

Our vision is clear — to create products that enrich lives while protecting natural resources and preserving the environment for future generations.

At Greenpanel, sustainability is not merely a business practice; it is a long-term commitment to building a greener, stronger, and more sustainable future.□





Rooted in Responsibility: Greenlam's Sustainable Future Blueprint

Innovations and Initiatives in the Plywood & Panel Industry



"Sustainability, to us, is not an obligation to be reported; it is a responsibility to be practiced across sourcing, manufacturing, products and communities"

2030-31

A roadmap for measurable ESG progress



Saurabh Mittal
Managing Director & CEO
Greenlam Industries Limited

The plywood and panel industry is at an important point in its evolution. Demand for better homes, offices, institutions, hospitality spaces and public infrastructure is expanding the role of engineered wood, plywood, laminates and surface solutions in everyday life. At the same time, industry is being asked to grow with greater responsibility: to use resources carefully, deliver global standards of quality, reduce environmental impact, strengthen traceability and create value for communities connected with the supply chain.

At Greenlam, we see this not as a constraint, but as a defining opportunity. Sustainability is not an adjunct to our strategy; it is the lens through which we define growth, resilience and long-term value creation. As we expand from a surface products company into an integrated surface and substrate solutions provider, our responsibility towards natural resources, customers, employees, farmers and future generations becomes even more central to our decisions.

From Resource Dependence to Resource Stewardship

Wood-based industries must recognise a simple reality: the future of panels cannot be built on short-term procurement alone. India's wood economy needs a stronger, more scientific and more localised plantation base. A sustainable panel industry must improve the reliability of industrial wood availability and create a transparent ecosystem in which farmers, supply chains, industry and the environment all benefit together.

This is where Greenlam's sustainability journey is rooted. Our approach is to move from resource consumption to resource stewardship. That means responsible sourcing, farm and agroforestry partnerships, high-quality planting material, efficient manufacturing, product safety and measurable ESG outcomes.

A realistic ESG Roadmap

We have set ambitious yet practical goals that will guide our progress through 2030-31. Our commitment to Net Zero emissions across Scope 1 and Scope 2 at manufacturing level is being pursued through renewable energy adoption, process optimisation and energy-efficiency improvements.

Our water stewardship agenda focuses on recycling, rainwater harvesting, groundwater recharge and reduced freshwater dependency, particularly in water-stressed regions. Resource circularity is another priority. We are working towards Zero Waste to Landfill, reduction in packaging impact, higher use of recycled materials and improved product design. We also remain committed to safety and quality through globally recognised certifications and low-emission products that meet the expectations of global customers.

For us, sustainability is not a declaration of completion. It is a disciplined journey of setting goals, measuring progress, correcting course and strengthening accountability.

Innovation across Products and Operations

In the plywood and panel industry, innovation must extend beyond aesthetics. It must include materials, process efficiency, emission control, water treatment, product durability and responsible design. At Greenlam, our manufacturing facilities are being strengthened with energy-efficient practices, advanced compliance systems, electrostatic precipitators for air emission control, modern water-treatment systems and continuous R&D integration.



The customer today wants surfaces and substrates that are beautiful, durable and responsible. Our endeavour is to deliver products that not only match global quality standards but also help architects, builders, OEMs, dealers and consumers make choices aligned with performance as well as environmental responsibility.

Vriksha Vriddhi: Strengthening Roots, Nurturing Dreams

One of the most meaningful pillars of our long-term sustainability roadmap is Vriksha Vriddhi - Greenlam's unique Agroforestry and Tree Based Farming promotion initiative. Conceived to support woodresource self-sustainability for our woodbased operations, Vriksha Vriddhi is designed around farmer outreach, techextension, scientific silviculture, clonal planting stock, handholding, monitoring, traceability and long-term ecosystem development around our wood based operations in the states of Andhra Pradesh and Tamil Nadu.

The programme began with a 45-acre pilot in FY 2023-24 and moved into industrialscale execution from FY 2024-25. By March 2026, over 6.8 million trees have been planted across more than 5,700 acres of scientifically managed plantations, touching the lives of over 1,000 farmers. The programme is planned to progress towards planting up to 10 million trees annually over FY 2025-30, with a focus on coastal Andhra Pradesh and Tamil Nadu.

Vriksha Vriddhi is farmer-centric by design. It promotes an 'All-in-One Multi-Product Plantation Model', enabling farmers to grow trees as also grow-with-trees alongside traditional crops, improve land utilisation and create an additional income stream from marginal, fallow, waste, degraded and underutilized lands. Our teams work closely with farmers, village heads and local influencers through rural outreach, training, tech support and post-plantation handholding during the entire life-cycle of the planted trees.

Technology is also central to this effort. A dedicated mobile application, geo-tagging and real-time tracking of plantations and farmers' journey strengthen transparency, farmer engagement and more productive land use. In addition, clonal research, quality planting material and future-ready nursery systems are expected to improve productivity and resilience over time.

Building a Traceable and Resilient Ecosystem

The larger objective is to build self-reliant, community-integrated, self-sustainable wood supply chain ecosystem.

Vriksha Vriddhi at a glance

- 45-acre pilot in FY 2023-24
- 6.8 million+ trees planted by March 2026
- 5,700+ acres covered
- 1,000+ farmers engaged
- Planned progression towards up to 10 million trees annually over FY 2025-30
- Focused around Tindivanam and Naidupeta command areas

Greenlam 2030-31 direction

- Net Zero Scope 1 & 2 emissions at manufacturing level
- Water-positive operations through recycling, recharge and intensity reduction
- Zero Waste to Landfill and circular resource use
- Responsible, local and verifiable wood sourcing



“Vriksha Vriddhi endeavors to empower rural communities to grow-trees and grow-with-trees by creating a symbiotic association and enabling self-sustainable wood supply chain ecosystems.

Strengthening Roots, Nurturing Dreams captures the spirit of a programme that connects industrial resilience with farmer prosperity and ecological responsibility.”

Planned Agroforestry can reduce raw-material volatility, ensure Farm to Factory traceability and chain of custody, establish conformance to globally recognized credible standards, shorten transport distances, support carbon sequestration, enhance tree cover, improve soil health and create livelihood opportunities. It also helps the industry move towards responsible forestry and credible certification systems.

This matters not only for Greenlam, but for the broader plywood, panelboard and MDF/HDF ecosystem. The industry's future competitiveness will depend on how responsibly it secures wood, how transparently it demonstrates compliance, and how confidently it can tell global customers that Indian panel products are built on ethical, scientific and sustainable foundations.

A shared responsibility

No single company can build a sustainable industry alone. The next phase will require stronger collaboration among farmers, state agencies, research institutions, suppliers, manufacturers, dealers and customers. It will require realism in targets, consistency in execution and humility in communication.

At Greenlam, we are proud of the progress made, but we remain conscious that the journey is long. Our commitment is simple: to lead with purpose, act with responsibility and ensure that every step forward contributes to a more sustainable and resilient future for the plywood and panel industry.

The future we seek is not merely one of larger capacities and wider markets. It is a future where growth is cleaner, sourcing is traceable, products are safer, farmers are partners and business becomes a force for environmental and social renewal. That is the future we at Greenlam are working towards - steadily, responsibly and with conviction.□



EVERY PANEL YOU BUY MAKES A DIFFERENCE

For Farmers • For Communities
• For the Environment

BENEFITS TO FARMERS & RURAL INDIA

India's Plywood and Panel Industry Source their raw material from timber grown on farmlands known as

AGRIWOOD

When you buy plywood and panel products, you are benefiting the farmers by:

- Increasing Farmer Incomes
- Enhancing Rural Livelihoods
- Strengthening Rural Economies
- Sustainable Agroforestry Growth

Every Panel Purchased Supports India's Farmers

BENEFITS TO ENVIRONMENT

Plywood and Wood Panel Products are the most sustainable materials. When you buy a plywood or wood-based panel, you are benefiting the environment by:

- Expanding Green Cover
- Contributing to India's Sustainability Goals
- Reducing Pressure on Natural Forests

Every Panel Purchased Supports a Greener Future

SUPPORTING FARMERS

GROWING TREES

BUILDING BETTER HOMES

BUILDING A SUSTAINABLE INDIA



Saplings to Sustainable Supply Chains: Merino's Agroforestry and Soil Conservation



Ajay Kumar, Advisor (Economics, Strategy & Sustainability), Merino Group & Senior Economic Advisor, FIPPI

In a world increasingly defined by environmental responsibility and sustainable endeavors, Merino Group stands out as an organisation that has woven sustainability into its industrial fabric. At the heart of this commitment lies a transformative plantation drive — spanning hi-tech nurseries, large-scale farmer agroforestry and rigorous soil conservation — that is reshaping the landscape of Central Gujarat while securing long-term, traceable raw material supply for its Merino's Marine Board (Chipboard) facility in Halol. Rooted in its Eco-Vision of “creating enduring value through responsible production and consumption, in harmony with nature's regenerative power,” this initiative is as much about people and soil as it is about agroforestry with farmers for wood panel industry.

“Wood is good for India's industrial development — and Merino is the living proof of that philosophy in action.”

Women lead Green Drive



Women are at the very heart of this green initiative — both as Merino's trained agri-extension professionals guiding Elite Mother Plant Shoot Cuttings under mist-chamber conditions, and as farmer beneficiaries cultivating Eucalyptus on their own land. From precision cutting in the nursery to propagation of saplings for farmers, Merino's model demonstrates a complete, traceable supply chain that is simultaneously a story of ecological restoration and rural livelihood empowerment.



Elite Mother Plant Shoot Cuttings
Precision cloning at work: skilled hands prepare Eucalyptus shoot cuttings at Merino's Halol nursery, fueling a 10-million-sapling mission every year.

The Green Engine: Merino's Hi-Tech Nursery

Merino's plantation strategy is anchored by its state-of-the-art nursery in Halol, operational since 2023. Spanning over 12,580 square metres, this facility has a production capacity exceeding 25 lakh saplings per year. It houses a Clonal Multiplication Area (CMA), Mist Chambers (started at 10 lakh saplings per year, scaling to 30 lakh by December 2026), a Hardening Chamber and an Open Nursery (up to 8 lakh capacity at any given point of time). Predominantly producing high-performance Eucalyptus clones — Clone Nos. 03, 07, 413 and ECXED — the nursery ensures that only genetically superior, soil-compatible saplings reach farmers' fields, maximising yield and ecological compatibility. This nursery is not merely a production unit; it is the biological engine driving Merino's commitment to wood as a medium of positive industrial change for India.

Plantation Drive: From Nursery to Farmland

Through its farmer engagement programme HAMRAHI, Merino has seeded a powerful agroforestry movement across nine districts of Central Gujarat — Panchmahal, Chhota Udaipur, Mahisagar, Narmada, Anand, Kheda, Vadodara, Dahod and Ahmedabad. Over 4,000 farmers are



directly enrolled, backed by an agri-extension team of 25+ professionals who provide on-ground training, plantation monitoring and policy guidance.

The cumulative results are compelling: over 3.056 crore saplings distributed, covering 30,557 acres, with 3,697 farmers already having planted under Merino's agroforestry support — and the pace is accelerating. Merino has also supported bringing most of this area under Forest Stewardship Council (FSC) certifications, with reasonable species diversification as per FSC norms achieved in collaboration with farmers.



Farmer-Merino team on field survey with FSC on farm with sapling supplied from Merino.

The species focus on Eucalyptus is grounded in science: a Centre for Science and Environment (CSE) study confirms that Eucalyptus clones generate higher income per hectare than 60–70% of regular crops, while consuming far less water (785 litres/kg of biomass) — less than Acacia (1,323 litres/kg), cotton (3,200 litres/kg) or paddy (up to 3,000 litres/kg). As a living organisation that has internalised the 'wood is good' philosophy, Merino ensures that its agroforestry model is as economically rewarding for farmers as it is ecologically sound.



Soil Conservation: Nurturing the Land Beneath

Merino's sustainability vision extends below the surface. Its Soil Care Programme works in close tandem with the plantation drive to restore and maintain soil health across agricultural catchment areas. Each year, Merino supports the production and application of over 51 metric tons of vermicompost and 300 metric tons of bio-manure on collaborative farms — significantly reducing chemical fertiliser dependency and revitalising soil biology.



Vermicompost as bio manure from Merino's bamboo forestry.



Bamboo Nursery of Merino.

In FY 2025-26, Merino partnered with over 700 farmers cultivating potatoes across 1,732 acres, deploying Standardised Agronomic Practices (SAP) developed in collaboration with ICAR and State Agricultural Universities. These practices — centred on soil-test-based nutrient management and Integrated Pest Management (IPM) — are transforming traditional farming, improving yields while safeguarding soil ecology for future generations. Healthy soil is the foundation on which India's wood-based industrial future must be built, and Merino, as a living, evolving organisation, is actively investing in that foundation.

Miyawaki Forests & Factory Greening

Merino's green philosophy reaches deep inside its factory gates. At its Hapur facility, the Miyawaki Method — a technique for rapid multi-layered forest creation using native species — has been adopted to build dense, biodiversity-rich green pockets within the campus. Across all its operational geographies, Merino has planted over 20,000 tree saplings, dedicated five acres exclusively to bamboo cultivation and brought nearly one-third of factory areas under green cover. This is Merino as a living entity in its truest sense: an



Integrated factory and green farm of Merino in Hapur organisation that does not merely produce from the land, but actively returns life to it — reinforcing that wood is good, not just for industry, but for the planet.

Way Forward

India’s industrial future will be shaped by those who recognise that wood is good — good for the economy, good for the farmer, good for the climate. With an annual target of 10 million new saplings every year under its agroforestry programme and a commitment to engage more than 5,000 farmers directly, Merino Group is not just building a supply chain; it is nurturing a living ecosystem. As a living, breathing institutional entity that has embedded environmental stewardship into its business model, Merino is setting a replicable benchmark for sustainable, soil-positive and community-inclusive industrialisation in India’s wood-based sector — demonstrating, with every sapling planted and every acre conserved, that green and growth are not opposing forces, but natural partners.□



WOOD-BASED PANELS
SUSTAINABLE SOULTION TO
CLIMATE CHANGE MITIGATION



Evaluation and Extension of Clones/Varieties Developed by ICFRE for the Plywood and Panel Industry



FIPPI Signs MoU with ICFRE to Strengthen India's Raw Material Security



In a significant step towards ensuring the long-term sustainability and raw material security of India's plywood and panel industry, the Federation of Indian Plywood and Panel Industry (FIPPI) has signed a Memorandum of Understanding (MoU) with the Indian Council of Forestry Research and Education (ICFRE), Dehradun, for the collaborative project titled **"Evaluation and Extension of Clones/Varieties Developed by ICFRE for the Plywood and Panel Industry."**



The collaboration represents a major milestone in strengthening industry–research partnerships aimed at addressing one of the sector's most critical challenges—availability of quality raw material. The project seeks to evaluate, validate, and promote the large-scale adoption of superior clones and varieties developed by ICFRE, thereby enhancing plantation productivity, improving wood quality, and supporting the sustainable growth of the wood-based panel industry.

The three-year project, with a total outlay of ₹156.34 lakh, will be implemented through the combined expertise of five premier ICFRE institutes:

- ICFRE–Institute of Wood Science and Technology (IWST), Bengaluru
- ICFRE–Institute of Forest Genetics and Tree Breeding (IFGTB), Coimbatore
- ICFRE–Forest Research Institute (FRI), Dehradun
- ICFRE–Institute of Forest Productivity (IFP), Ranchi
- ICFRE–Rain Forest Research Institute (RFRI), Jorhat

The participating industries in the project are as follows:

1. Century Plyboards (India) Ltd.
2. Greenply Industries
3. Greenpanel Industries
4. Action Tesa
5. Greenlam Industries

Project Objectives (Phase I):

1. Rapid screening of existing clones/varieties developed by ICFRE institutes and clonal material currently used by the industries.
2. Lab scale studies on the suitability of identified clones for panel production (plywood, particleboard, and MDF).
3. Supply of quality planting material and technical guidelines/package of practices of shortlisted clones/varieties by the respective ICFRE research institutes to the participating industries.

- Establishment of germplasm banks at participating Institutes and multilocal trials in catchment areas of participating industries.

Establishment of demonstration trials of identified clones of various species in the 16 catchment areas of participating Industries. Each industry participant has shared their catchment area where clonal demonstration plots can be established:

I. Greenply Industries Ltd.

- Nagaland – Tizit
- West Bengal – Kripampur
- Uttar Pradesh – Sandila
- Gujarat – Rajkot
- Odisha-Simliguda

II. Greenpanel Industries Ltd.

- Andhra Pradesh – Sri Kalahasti
- Uttarakhand – Rudrapur

III. Century Plyboards (India) Ltd.

- Andhra Pradesh – Kadapa
- Tamil Nadu – Chennai
- Punjab – Hoshiarpur
- Assam – Guwahati

IV. Action TESA

- Uttarakhand – Rudrapur
- Andhra Pradesh – Visakhapatnam

V. Greenlam Industries Ltd.

- Andhra Pradesh – Nellore/Tirupati
- Tamil Nadu – Tindivanam
- Uttar Pradesh – Sitapur

Important Deliverables from the Project:

- Identification and selection of potential clones/hybrids suitable for plywood and panel industries based on wood properties.
- Production of quality planting stock and establishment of a germplasm bank of selected clones for further supply to Industries and farmers.
- Establishment of demonstration trials of identified clones of various species in the catchment areas of participating Industries for further testing for suitability, field performance, adaptability, and popularization among growers.
- Establishment of strong linkage and co-operation among Industries, Institutes, and tree growers/farmers for the further phase of the project.
- Availability of raw material for plywood and panel industries significantly improved across the country.

By systematically assessing growth performance, adaptability, and wood-quality traits, the project aims to identify superior and site-specific clones suitable for large-scale plantation deployment. The outcomes are expected to provide a sustainable supply of quality raw material to the wood-based industries, enhance industrial productivity, and reduce dependence on imported timber.

The project aligns with national priorities under the National Agroforestry Policy, Make in India, and Aatmanirbhar Bharat initiatives by promoting clonal forestry, supporting farmer participation in raw material production, and fostering environmentally sustainable industrial growth. Ultimately, it seeks to contribute to self-reliance in the wood-based sector while advancing climate resilient and resource-efficient forestry practices in India.□



A Round Table Discussion on a Long-Term Roadmap for Scaling Agroforestry

*Organised by Council on Energy, Environment and Water (CEEW) and BITS Pilani
Goa Campus / 13 May 2026, New Delhi*

Background



The roundtable discussion on **“Scaling Agroforestry in India: Towards a Long-Term Strategic Roadmap”**, jointly organised by the Council on Energy, Environment and Water (CEEW) and BITS Pilani Goa Campus, convened a diverse group of experts representing government institutions, industry, research organisations, civil society, and the finance sector. The event focused on bridging the gap between national climate ambitions and field-level implementation realities, drawing on evidence from multi-state assessments conducted across Odisha, Assam, and Maharashtra. The discussion underscored agroforestry’s significant potential to contribute to India’s net zero target by 2070, reduce the country’s growing dependence on imported timber (currently approaching USD 10 billion

annually), generate approximately 3.1 million full-time equivalent jobs by 2047, and create an additional carbon sink of 3.5–4.0 billion tonnes of CO₂ equivalent through forest and tree cover by 2035 from the 2005 level as part of India’s updated Nationally Determined Contribution (NDC) under the Paris Agreement. Participants collectively emphasised the urgent need for a National Agroforestry Mission backed by a dedicated enabling Act, clear budgetary allocation, and structured implementation architecture aligned with India’s Viksit Bharat@2047 vision and its updated Nationally Determined Contributions (NDCs).

Objectives

The roundtable was designed around four interlinked objectives:

- The roundtable was designed around four interlinked objectives:
- Alignment of the developed roadmap with market demand, biomass potential, and ecological suitability.
- Integrating agroforestry planning with wood-based industries for reduction of import dependence.
- Mechanisms to strengthen farmer-industry linkages and ensure reliable domestic wood supply.
- Strengthen institutional mechanisms for effective coordination and sustainable agroforestry development.

Recommendations proposed by participants

The following key action points emerged from the round table discussion:

i. Policy and governance

- Establish a National Agroforestry Roadmap with dedicated budget allocation, clear targets, and an administrative structure under the Ministry of Agriculture and Farmers Welfare.
- Consider an India Act on Promotion of Agroforestry to classify farm-grown trees as agricultural produce, permanently removing them from forest regulatory frameworks.
- All states should be mandated or incentivised to adopt state-specific agroforestry policies with implementation roadmaps and monitoring mechanisms.
- A Joint Secretary-level position on Agroforestry should be created in the Ministry of Agriculture to provide sustained administrative leadership.
- Each state should establish a dedicated institutional mechanism for agroforestry, such as a State Agroforestry Board or State Agroforestry Mission, to ensure coordinated planning, cross-departmental convergence, and accountable implementation at the sub-national level.

ii. Market and value chain

- Develop a government-backed Minimum Support Price or price assurance mechanism for key agroforestry species to provide farmers with market confidence.
- Establish regional wood market hubs and digital buyer-seller platforms to reduce dependence on intermediaries and improve price discovery.
- Promote FPO-mediated aggregation of smallholder produce to make direct industry procurement economically viable.
- Extend e-NAM to include agroforestry produce, enabling transparent digital trading of timber, bamboo, NTFPs, and related products.
- Develop a national Market Knowledge Information System providing real-time price and demand data for key agroforestry species.

iii. Regulation and compliance

- Accelerate deployment of the National Timber Management System with geo-tagging of trees outside forests to simplify transit and felling compliance.
- Issue digital certificates of tree ownership to farmers at the time of planting to create a verifiable, tamper-proof record.
- Deploy machine learning-based tree mapping algorithms at national scale for species identification, carbon stock monitoring, and regulatory compliance.
- States must complete notification and verification of degraded land available for PPP-mode industry leasing without further delay.

iv. Financing

- Develop a national agroforestry finance tagging framework to improve visibility of public expenditure and identify financing gaps.
- Design state-specific blended finance instruments that combine public risk capital with private finance, tailored to local agro-ecological and regulatory conditions.
- Create crop insurance products specific to tree crops, acknowledging long gestation periods and distinct risk profiles.
- Mainstream carbon finance as a supplementary income stream for farmers, with standardised, farmer-accessible methodologies.
- Incentivise NABARD and commercial banks to develop agroforestry-specific credit products distinct from general agricultural loans.

v. Research and data

- Expand CEEW's district-level roadmap approach to all major agroforestry states, linking spatial biomass data to market demand and industry cluster viability.
- Develop and disseminate economic models for major agroforestry systems, providing farmers with lifecycle cash flow projections.
- Invest in long-rotation, high-value species research (teak, pine alternatives) to reduce import dependence in premium timber segments.
- Conduct a national land-use modelling exercise to explicitly allocate land for agroforestry and resolve competing demands from solar, oil palm, and other sectors.

vi. Extension and capacity building

- Establish dedicated Subject Matter Specialists for agroforestry in all Krishi Vigyan Kendras (KVKs).
- Replicate and scale successful models, particularly the Wadi model and poplar-based agro-industrial clusters through structured knowledge transfer programmes.
- Integrate agroforestry into SAU curricula to build a next generation of specialists and entrepreneurs.
- Use digital platforms for mass farmer education on species selection, planting techniques, and market access. □

Recognition of Indian Standards Key to Boosting Exports of Wooden Panel Products



Sandeep Gupta

Partner, Northern Plywood Products & General Secretary, Uttarakhand Ply Manufacturers Association

India's wooden panel industry is undergoing a major transformation through the implementation of the Quality Control Order (QCO), modernization of BIS standards, and a growing focus on quality-driven manufacturing. While these developments have strengthened the domestic credibility of Indian plywood and laminate products, the next big opportunity lies in expanding exports and gaining greater international recognition.

In this regard, the recent online meeting organized by the Ministry of Commerce and Industry with plywood and laminate manufacturer associations was a positive initiative. The discussions focused on identifying export opportunities, understanding international markets, and helping Indian manufacturers connect with global buyers.

The Ministry highlighted the strong potential for Indian plywood and laminate exports, especially considering India's growing manufacturing capacity and improving quality standards. However, the industry also raised several concerns that continue to hinder export competitiveness.

Challenges Before the Industry

One of the major concerns remains the high cost of timber in India compared to competing countries, which affects price competitiveness in global markets. Along with rising costs, the industry is also facing a shortage of quality timber availability, creating pressure on manufacturers and impacting long-term raw material security.

Another major challenge is the growing requirement for foreign certifications such as CARB, EUDR, and FSC. For MSMEs, these certifications often involve high compliance costs, lengthy documentation, and complex procedures, making exports difficult despite adherence to stringent Indian standards.

Recognition of Indian Standards

The industry strongly emphasized that Indian ISI standards have evolved significantly under the QCO framework and are now technically robust and comparable to global benchmarks. Greater awareness needs to be created among international buyers regarding the credibility of Indian standards and certifications.



Recognition of Indian BIS standards internationally would reduce duplication of compliance requirements and create better export opportunities, particularly for MSMEs.

India's Agro-Forestry Advantage

Unlike many global economies that rely heavily on natural forest extraction, India's plywood industry is largely supported by agro-forestry and farm-grown timber plantations. The industry actively promotes sustainable plantation practices and supports farmers through timber cultivation.

The sector therefore believes that India's wood panel industry should not be viewed under the same framework as forest-dependent economies, reducing the need for multiple foreign forestry certifications.

The Way Forward

To address timber shortages, the industry has urged the government and state forest bodies to promote large-scale plantation of Poplar and Eucalyptus (Lyptus), which are vital raw materials for the plywood sector. Greater plantation support, farmer incentives, and simplified agro-forestry policies can significantly improve raw material availability in the future.

India's wooden panel industry has already demonstrated its commitment toward quality and modernization. With stronger international recognition of Indian standards, improved raw material availability, and supportive government policies, the country has immense potential to emerge as a major global exporter of plywood and laminate products. □

UK UP Ply Manufacturers Association at the Forefront of Modernizing ISI Standards

The implementation of the Quality Control Order (QCO) marked a turning point for India's plywood and wood panel industry. While the move aimed to improve product quality and standardization, it also posed significant challenges, particularly for MSMEs. Much of the existing ISI framework had been developed decades ago, when plywood was primarily manufactured using seasoned forest timber and traditional production methods, making several provisions difficult to implement under modern manufacturing conditions.

Recognizing the need for practical and inclusive standards, the Uttarakhand Ply Manufacturers Association (UPMA), under the guidance of Aditya Agarwal, Partner, Northern Plywood Products, took a proactive role in bridging the gap between regulatory requirements and industry realities.

Rather than opposing the QCO framework, the association worked closely with BIS, DPIIT, IWST, and industry stakeholders to modernize standards while maintaining quality benchmarks. Key initiatives included participation in meetings with government and technical bodies, organizing Manak Manthan to facilitate dialogue between BIS and industry, forming a BIS Working Committee comprising representatives from various state associations, and actively contributing to BIS technical committees CED 20 and CED 11.

These efforts have led to several significant reforms:

IS 303 – General Purpose Plywood

The association successfully advocated for rationalization of bending class requirements and face veneer thickness criteria, making the standard more inclusive for plywood manufactured across India using different timber species and production practices.

IS 1659 – Block Boards

Important reforms included removal of the mandatory spot test, easing of stringent bending class requirements, and relaxation of overly rigid tolerances, improving manufacturability without compromising quality.

IS 4990 – Preservative-Treated Plywood

The association played a key role in removing mandatory

retention requirements for CCB and ACC preservatives, provisions that were considered impractical for large-scale implementation.

IS 2202 – Flush Doors

Work is currently underway on a revised standard that seeks to include lower-category doors manufactured using production by-products, a development that could significantly benefit MSMEs and promote resource efficiency.



The association's contribution to quality enhancement and standard development was recently recognized by BIS Dehradun, which conferred the **Excellence in Quality Award** upon UPMA. The award was presented by the Hon'ble Chief Minister of Uttarakhand, Shri Pushkar Singh Dhami, to Sandeep Gupta, Partner, Northern Plywood Products and General Secretary of the Uttarakhand Ply Manufacturers Association.

Through constructive engagement with regulators and industry stakeholders, UPMA has demonstrated that effective standardization is achieved through collaboration. Under the leadership of Aditya Agarwal and the active participation of industry members, the association continues to play a pivotal role in shaping a modern, practical, and globally competitive plywood industry for India. □

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Road Map for Process Improvement in Plywood Manufacturing Through Scientific Veneer Drying and Moisture Management



1. Objective

To improve plywood quality, increase productivity, reduce glue consumption, minimize defects, and enhance product life through scientific control of veneer drying and moisture distribution.

Subir Ray Chaudhuri
Consultant

Phase 1: Assessment of Existing Drying Process

Key Activities

- Conduct a detailed study of existing veneer dryer performance.
- Measure:
 - Veneer moisture content at dryer entry and exit.
 - Temperature profile across dryer zones.
 - Humidity levels inside the dryer.
 - Energy consumption per cubic meter of veneer dried.
- Identify moisture variation between veneer surface and core.

Expected Outcome: A baseline understanding of process inefficiencies and moisture-related defects.

Phase 2: Scientific Control of Veneer Drying

Problem Identified: Wood and veneer are poor conductors of heat. Under conventional drying:

- Surface moisture evaporates rapidly.
- Internal moisture remains trapped.
- Excessive heating creates moisture gradients.

Improvement Actions

- Introduce controlled drying schedules.
- Optimize:
 - Temperature
 - Air velocity
 - Relative humidity
 - Residence time
- Avoid aggressive drying conditions.

Expected Outcome: Uniform moisture removal throughout the veneer thickness.

Phase 3: Moisture Equalization System

Problem Identified: Uneven moisture distribution causes:

1. Surface cracks.

2. Veneer warping.
3. Reduced flexibility.
4. Uneven glue spread.
5. Higher glue consumption.

Improvement Actions

- Install moisture equalization or conditioning zones after drying.
- Allow moisture redistribution before further processing.
- Maintain optimum veneer moisture content suitable for gluing.

Expected Outcome: Stable veneer with improved dimensional accuracy and bonding characteristics.

Phase 4: Improvement in Glue Application

Key Activities

- Match veneer moisture content with adhesive requirements.
- Standardize glue spread rates.
- Monitor glue penetration and bond quality.

Benefits

- Lower glue consumption.
- Better bonding strength.
- Reduced delamination risk.

Phase 5: Optimization of Hot Press Performance

Problem Identified

Over-dried veneer affects heat transfer during pressing.

Improvement Actions

- Maintain optimum moisture content before pressing.
- Ensure moisture uniformity across veneer sheets.
- Monitor hot press temperature and pressing cycle.

Expected Outcome

- Better heat transfer.

- Uniform resin curing.
- Improved panel integrity.

Phase 6: Quality Monitoring and Continuous Improvement

Quality Parameters to Track

- Veneer moisture content (%)
- Glue consumption
- Bond strength
- Panel warping
- Surface defects
- Delamination rate
- Productivity
- Energy consumption

Expected Outcome: A data-driven manufacturing system with consistent product quality.

Expected Benefits

Area	Improvement
Product Quality	Higher
Glue Consumption	Lower
Surface Defects	Reduced
Delamination	Reduced
Productivity	Higher
Heat Transfer in Press	Improved
Energy Efficiency	Improved
Product Life	Longer

Conclusion

Veneer drying is one of the most critical operations in plywood manufacturing because it directly influences bonding quality, dimensional stability, productivity, and final product performance. Excessive or uncontrolled drying creates moisture gradients between the surface and the inner layers of the veneer, leading to surface cracks, warping, increased glue consumption, poor heat transfer during hot pressing, and inferior finished products.

The solution lies not in increasing drying intensity but in adopting a scientific drying approach that emphasizes controlled temperature, humidity management, moisture equalization, and continuous monitoring of veneer moisture content. By maintaining a uniform moisture profile throughout the veneer and ensuring appropriate moisture levels before gluing and hot pressing, manufacturers can significantly improve product quality, reduce manufacturing costs, conserve resources, and enhance overall process efficiency.

Therefore, scientific moisture management should be regarded as a fundamental pillar of modern plywood manufacturing, contributing simultaneously to quality enhancement, cost optimization, productivity improvement, and sustainable utilization of timber resources.□



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FIPPI Submits Comments on Applicability of Revised Limits of Formaldehyde Class E2 Across Standards



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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7 April 2026

To
Nishikant Singh,
Scientist-D / Joint Director,
Member Secretary, CED 20
Bureau of Indian Standards
Manak Bhawan, 9, Bahadur Shah Zafar Marg,
New Delhi-110002.

Subject: Submission of Comments Regarding Applicability of Revised Limits of Formaldehyde Class E2 in Across Standards Under CED 20.

Dear Sir,

This is with reference to your email regarding the query on the limits of Formaldehyde Class E2 in connection with the grant of licence under IS 12823:2025 (Pre-laminated Medium Density Particle Boards from Wood and other Lignocellulosic Material — Specification).

In this context, we would like to submit the following comments:

1. The revised limit for Formaldehyde Class E2 (≤ 30 mg/100 g of oven-dry sample) as specified in Amendment No. 2 to IS 303:2024, may be considered applicable to IS 12823:2025.

This recommendation is in line with the decision taken during the 36th Meeting of CED 20 held on 22 December 2025, wherein the Committee agreed to modify the limits of Formaldehyde Class E2 as below: $E2 \leq 30$ mg/100 g of oven-dry sample in Indian Standards, IS 303: 2024 – Plywood for General Purposes and IS 1659: 2004 - Block Boards – Specification.
2. A uniform approach for Formaldehyde Class E2 requirements may be adopted across all relevant standards under CED 20. This would ensure consistency in technical requirements, particularly as similar test methods (IS 13745) are being followed across these standards.
3. It is recommended that suitable amendments may be issued in IS 12823:2025 and other concerned standards wherever Formaldehyde Class E2 requirements are specified to ensure consistency and avoid ambiguity.

The above comments are submitted for your kind consideration.

Yours sincerely,

Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)

Safeguarding the Integrity of Quality Control Orders: FIPPI Responds to Representation on Birch Plywood & Radiata Pine MDF



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FIPPI/DPIIT/2026-27/05

27 April 2026

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

Subject: Response to Representation Made by Eximcorp India Pvt. Ltd. Regarding Supply Constraints of Birch Plywood and Radiata Pine MDF.

Respected Sir,

We most respectfully wish to draw your kind attention to the representation made by M/s Eximcorp India Pvt. Ltd. regarding supply constraints of Birch Plywood and Radiata Pine MDF.

At the outset, we wish to submit that the concerns raised by the said entity do not reflect the overall ground reality of the Indian plywood and panel industry. We further submit the following for your kind consideration:

1. Impact of Quality Control Orders (QCO)

The implementation of Quality Control Orders (QCO) by the Government of India has been a transformational and highly positive step for the industry.

- Prior to QCO, the domestic industry was under severe stress due to large-scale import of substandard and non-compliant products, pushing Indian manufacturers to the verge of collapse.
- Post-QCO implementation, the industry has stabilized, strengthened, and significantly improved product quality, ensuring consumer protection and fair competition.
- The QCO framework has also encouraged investments, formalization, and technological upgradation within India.

Thus, any dilution of QCO norms would be detrimental to both domestic industry and consumer interest.

2. Availability of Products & Domestic Capability

The Indian plywood and panel industry today is fully capable of meeting diverse application needs, including high-performance boards.

- India has wide availability of multiple timber species, and manufacturers have developed products suited to varied applications and climatic conditions.
- Globally also, different countries use different species based on local availability—birch is only one such species and not indispensable.
- Indian manufacturers are capable of offering equivalent or superior performance products through appropriate grading, bonding standards, and technology.

3. On Birch Plywood & Specific Species Demand

It is important to distinguish between functional requirement vs species preference:

- If a particular customer requires a specific species like Birch, it is a niche requirement and not a market-wide necessity.
- BIS standards in India are performance-based, not species-based, which is the correct global practice.
- Therefore, products should be evaluated based on quality, grade, and end-use performance, not merely on species origin.

4. Import Flexibility under BIS Framework

FIPPI fully supports a balanced and practical approach:

- If a specific product or species is required in limited or specialized quantities, imports may be allowed subject to BIS certification compliance.
- Alternatively, manufacturers from exporting countries are free to apply for BIS certification, thereby enabling compliant imports.
- This ensures that quality standards are not compromised while allowing genuine needs to be met.

5. On Allegations Regarding Competitiveness

The claim that domestic industry lacks competitiveness is factually incorrect:

- Indian plywood and panel manufacturers are now globally competitive, both in cost and quality.
- The industry has made substantial investments in capacity, automation, and product development.
- QCO has ensured a level playing field, preventing dumping of inferior products.

6. Overall Industry Perspective

The concerns raised appear to be isolated and business-specific, rather than representing systemic issues. From a broader perspective:

- There is no general shortage of plywood or MDF in India.
- Domestic supply chains are robust and capable of meeting demand.
- The current regulatory framework strikes a healthy balance between quality control and market access.

Conclusion

In view of the above, FIPPI respectfully submits that:

1. QCO regime should continue without dilution in the interest of quality, consumer safety, and domestic manufacturing.
2. Species-specific preferences should not override performance-based standards.
3. Imports, if required, should be strictly routed through BIS compliance.
4. The representation made does not warrant any policy relaxation or structural change.

We remain available to provide any further data or clarification as required.

Yours sincerely,



Sajjan Bhajanka
Chief Patron, FIPPI
CMD, Century Plyboards India Ltd.



Rajesh Mittal
President, FIPPI
CMD, Greenply Industries Ltd.

For Federation of Indian Plywood and Panel Industry (FIPPI)



FIPPI Submits Representation on Urea Use in the Wood-Based Panel Industry



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 DELHI 110 008, INDIA

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FIPPI/DPIIT/2026-27/09

11 May 2026

To
The Director
Department for Promotion of Industry and Internal Trade (DPIIT)
New Delhi.

Subject: Representation Regarding the Use of Urea in the Wood-Based Panel Industry.

Respected Sir,

We respectfully submit this representation to provide clarity on the usage of urea and urea-based chemicals in the wood-based panel industry, including plywood, particle board, and MDF sectors.

1. Plywood Industry Structure

The plywood industry in India comprises more than 3,000 units, predominantly operating in the small-scale and cottage sector. A significant portion of these units are promoted and run by farmers and are closely linked to agroforestry and farm-based timber cultivation.

In plywood manufacturing, timber and agro-based raw materials constitute approximately 97% of the total composition of the product.

Given the highly fragmented and decentralized nature of this sector, operational practices vary widely. Some units manufacture resin in-house, while others procure it from external suppliers. Similarly, procurement of urea—whether industrial-grade or otherwise—is not uniform across the industry. Due to this variability, it is extremely difficult to accurately assess or quantify the overall consumption of urea in the plywood segment.

2. Organized / Large-Scale Segment

The organized and larger segment of the industry is focused on the production of high-value and premium-grade products. These manufacturers increasingly use advanced technologies and alternative adhesive systems, and in many cases, do not rely on urea-based resins at all, or use them only minimally.

3. Transition Towards Bio-Resins

The industry is undergoing a significant technological shift toward the adoption of bio-resins and environmentally sustainable adhesive systems. As a federation representing the industry, we firmly believe that within the next one year, a substantial proportion of plywood manufacturing units will transition to bio-resins, thereby reducing or eliminating the dependency on urea-based inputs in this segment.

4. Particle Board and MDF Industry

The particle board and MDF sectors are relatively more organized and typically fall within medium to large-scale investment categories.

These industries are fundamentally dependent on agro-based raw materials and waste, including bagasse, agricultural residues, forest thinnings, timber tops and lops, and even low-grade firewood.

Specifically, the MDF industry utilizes nearly 100% agro-based raw materials, primarily comprising plantation timber, wood residues, and agricultural waste, making it a highly sustainable and resource-efficient segment.

Geographically, a large concentration of particle board and MDF manufacturing units is located in Gujarat, Uttar Pradesh, Uttarakhand, and Andhra Pradesh, where availability of agro-based raw materials supports their operations.

Due to stringent environmental regulations and licensing requirements, setting up in-house resin manufacturing facilities is both complex and restrictive. Consequently, most manufacturers depend on third-party resin suppliers. The industry procures such resins with the clear understanding that the suppliers are compliant with all applicable legal, environmental, and regulatory standards concerning chemical usage.

Furthermore, several major manufacturers are increasingly adopting Melamine Formaldehyde (MF) and other advanced resin systems, which further reduce the dependence on urea. Most panel manufacturers neither possess the technical capability nor the strategic inclination to produce resin in-house, as they prefer to focus on their core manufacturing processes. This approach is consistent with global industry practices.

5. Overall Industry Perspective and Conclusion

The wood-based panel industry in India is highly fragmented in certain segments and organized in others, making it inherently challenging to precisely quantify urea consumption across the sector. A significant portion of the industry relies on externally sourced, compliant resins rather than direct procurement of urea.

Importantly, the industry is deeply rooted in agroforestry and agricultural ecosystems, utilizing farm-grown timber and agro-residues. It plays a crucial role in promoting large-scale plantation activities outside natural forests, ensuring rapid replenishment of raw materials. The industry is also significantly contributing to the growth of the rural economy by encouraging farm forestry and enhancing farmers' income through sustained demand for timber and agro-based raw materials.

With appropriate policy support and growth of the sector, the industry has strong potential to contribute towards achieving India's target of 33% forest and tree cover in the coming decade.

In view of the above, it is humbly submitted that the wood-based panel industry should be recognized and treated as an agro-based industry.

In light of the above, we request your kind consideration while framing any policies, regulations, or controls concerning the use and distribution of urea for this sector.

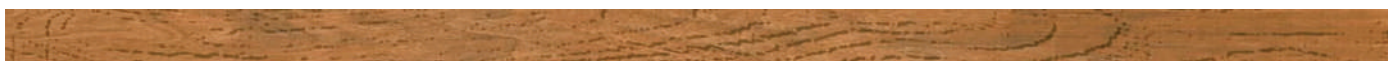
Thanking you.

Yours sincerely,

Rajesh Mittal

President

Federation of Indian Plywood and Panel Industry (FIPPI)



No. P-14031/130/2025-C. I E- 223087
/Government of India
/Ministry of Commerce & Industry
Department for Promotion of Industry & Internal Trade
(Consumer Industry Section)

Vanijya Bhawan, New Delhi
Dated: 14th May, 2026

To,
FIPPI/ All the Concerned Industry/ Associations

Subject: Request for Adherence to the Fertilizer (Control) Order, 1985 (FCO) of the Essential Commodities Act, 1955 (ECA)-Regarding Technical Urea.

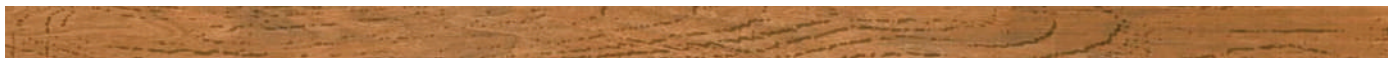
Sir/Madam,

1. The undersigned is directed to refer to communication received from Department of Fertilizers wherein reference is invited to meeting held under the chairmanship of Secretary (Fertilizers), wherein it was requested to explore mechanisms for monitoring usage of TGU in the plywood industry. Above matter has also been highlighted in past.
2. In this regard, it is to mention that plywood, panel and associated resin manufacturing industries make all efforts to augment the sourcing of Technical Grade Urea for industrial use through authorized channels only, and requested to provide the details of monthly requirement, procurement details and sources from where it is being procured etc. Further, the Industries are requested to report, if any instances of illegal use or diversion of agricultural urea, if observed, through the concerned Industry Associations.
3. Attention is also invited to the provisions under Section 25 of the Fertilizer (Control) Order, 1985, wherein fertilizers are meant for improving productivity of soil and crops only, and in no case shall subsidized agricultural urea be used for industrial purposes. The penal provisions applicable under the Essential Commodities Act, 1955 are stringent in nature.
4. In view of the above, Concerned Industry/Associations are advised to comply with the aforesaid provisions and provide the details as requested.

Yours faithfully,

Digitally signed by
Dheeraj Kumar Meena
Date: 14-05-2026
16:59:32
(Dheeraj Kumar Meena)

Under Secretary to the Govt. of India
Email: dheeraj.meena17@gov.in
Phone: 011 23038952



Key Updates on Quality and Standards

The 37th Meeting of BIS CED 20 (Wood and Other Lignocellulosic Products Sectional Committee) was convened on 21 May 2026 to review ongoing standardization activities, consider revisions to existing Indian Standards, and deliberate on the development of new standards for the wood and panel products sector. Some important decisions taken by the committee during the meeting are summarized as follows:

1. Key Updates on Plywood Standards

a) IS 303: Amendment No. 2 to IS 303 relating to general purpose plywood has been published.

b) Glue Line Protection (GLP) for Marine Plywood: The findings and exposure data generated from the study being carried out by IWST for Glue Line Protection (GLP) for IS 710 - Marine Plywood, will be considered during the comprehensive revision of IS 710.

c) Development of New Indian Standard on Decorative Plywood with Overlays (Other Than Natural Veneered Surface Overlays): Development work on a new standard for decorative plywood with overlays is being carried out by IWST, Bangalore. The study is expected to be completed within the next three months.

d) Revision of Existing Standards: The Committee decided that IS 5539 and IS 12120, require updating in view of recent developments in preservative treatment practices, including glue line protection (GLP). A dedicated working group will be constituted for detailed deliberations and preparation of the revised drafts. The working group would also examine issues related to preservative chemicals, treatment methods, testing protocols and assessment methodologies.

S. No. Working Group for IS 5539 and IS 12120

1. Chemist from CenturyPly
2. Shri S.K. Nath
3. 03 Scientists from IWST
4. Representative from IKEA

IWST will initiate preparation of the draft revisions and circulate the same to the working group for further examination and comments.

e) Prelaminated Plywood – Specification: The study is being carried out by IWST, and the testing and evaluation work are in progress. Based on the outcome of the study, a draft standard on pre-laminated plywood is expected to be prepared within the next three months for further consideration by the panel.

f) Flexible Plywood – Specification: Draft has been finalized with modifications to dimensional tolerances and preservative treatment provisions.

g) IS 4990-Shuttering Plywood: Amendment No. 1 to IS 4990:2024 (Plywood for Concrete Shuttering Works) has been finalized for publication.

2. Key Updates on MDF Standards

a) Fire Retardant MDF and Particle Boards — Specification: The study on fire retardant MDF and particle boards carried by IWST is under progress. The draft report on Fire Retardant MDF and Particle Boards has been submitted by IWST. In this regard, a stakeholder consultation has been organized by FIPPI on 1st July to finalise the comments on the draft report.

b) High Density Fibre Board — Specification: The Committee decided not to create a separate Indian Standard for High Density Fibre Board (HDF). IS 12406 shall be revised as a comprehensive standard for Fibre Boards, encompassing both MDF and HDF under a single framework. Accordingly, it was decided that the title of IS 12406 shall be revised.

- Fibre Boards shall be classified into:
- **Medium Density Fibre Board (MDF):** Density from 600 kg/m³ up to 800 kg/m³.

➤ **High Density Fibre Board (HDF):** Density above 800 kg/m³.
- The minimum density requirement for fibre boards shall continue to be 600 kg/m³.

The revised standard shall include provisions for High Moisture Resistant (HMR) and Boiling Water Proof (BWP) grades. The BWP grade shall be required to satisfy the prescribed boiling water resistance requirements and shall have a minimum density of 800 kg/m³.

Consequent upon the revision of nomenclature and classification, BIS shall take up the matter with DPIIT for necessary amendments, wherever required, in the relevant Quality Control Orders (QCOs).

c) Colour coding for identification of different grades in MDF Boards

- Decision was taken to include standardized colour-coding scheme in the marking provisions of the standard for easy identification of board grades. The use of the colour coding is optional, however, if a manufacturer opts to use it, they must follow this standard scheme to prevent confusion. Accordingly, the following note has been proposed for incorporation in the standard:

“The fibre boards may be colour coded by incorporation of a dye in the panel in case the manufacturer opts for colour coding.

The colour coding shall be as per the following scheme for easy recognition of board grades by

consumers and other stakeholders: Regular Grade (RG) — Natural colour; MR Grade — Pink; HMR Grade — Green; and BWP Grade — Black. The colour scheme shall not override the mandatory marking requirements prescribed in the standard.”

- Member Secretary was authorized to issue a draft Amendment to IS 12406 incorporating the above in wide circulation.

d) Handling and Disposal of Rejected MDF / HDF / Particle Boards: The Committee agreed that the study should cover practices relating to handling, interim utilization, recycling and safe disposal of rejected materials from MDF, HDF, particle board and plywood manufacturing units.

3. Key Updates on Particle Board Standards

a) Revision of IS 3129:1985 — Specification for Low Density Particle Boards: The revised draft of IS 3129 (Low Density Particle Boards) will undergo further technical evaluation and discussion before finalization. The scope may be suitably modified and kept general in nature rather than listing numerous specific raw materials.

h) Bagasse-Based Particle Boards: The committee decided to proceed with formulation of a separate standard for Bagasse-based Particle Boards/non-wood lignocellulosic particle boards, subject to suitable modifications in the draft and necessary consultation with DPIIT regarding QCO implications. The draft may be revised by removing references related to furniture applications in low-density grades before wide circulation. Amendment No. 3 to IS 1659 relating to block boards have been published.

4. IS 1659-Block Boards

Amendment No. 3 to IS 1659 relating to block boards has been published.

5. Review of Formaldehyde Content Requirements for E2 class and Removal of Eco Mark Provisions

- Existing standards will be aligned with the upcoming Desiccator Method for Formaldehyde Emission Testing. Committee agreed to issue wide circulation drafts for the proposed amendments relating to revision of formaldehyde emission limits for E2 class.
- Eco Mark provisions will be removed from relevant standards, including IS 1659, as Eco Mark certification is now administered separately by CPCB and BIS is no longer granting Eco Mark certification.

6. Laminated Floorings — Specification (NWIP)

The draft standard on Laminated Flooring – Specification has been finalized and approved for wide circulation.

7. Formaldehyde Emission Testing using the Desiccator Method

The draft has been finalized for publication.□





FIPPI'S R&D INITIATIVES FOR PROMOTING QUALITY STANDARDS AND SUSTAINABILITY

- Evaluation and Extension of Clones/ Varieties Developed by ICFRE for Plywood and Panel industry
- Develop a Draft Code of Practice for Utilization of up to 10% Rejects of Plywood and Panel Products
- Evaluate the Efficacy of Glueline & Fixed Preservative Chemical Dual Category Treatment for Plywood against Microbial Attack Under Marine Conditions
- Development of Draft Standard for Assessing Formaldehyde Emission by Desiccator Method
- Developing Methodologies for Agroforestry based Carbon Offset Projects in India
- Development of Draft Standard for Flame Retardant Particle Board and Medium Density Fibre Board
- Extension and Adoption of Bio-based Adhesives
- Flexi-ply
- Fire Retardant MDF and Particle Board
- High Density MDF
- Pre-laminated Plywood
- Bagasse Particle Board







Ensuring Continued Policy Stability for Quality Control Orders: FIPPI Submits Updated Assessment on the Impact of QCOs on the Plywood and Wood-Based Panel Industry



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

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FIPPI/DPIIT/2026-27/13

May 30, 2026

To,
Shri Sumeet Jarangal, IAS
Joint Secretary
Department for Promotion of Industry and Internal Trade (DPIIT)
Vanijya Bhawan, New Delhi – 110001

Kind Attention:
Shri Mohammad Isharar Ali,
Director,
Department for Promotion of Industry and Internal Trade (DPIIT).

Subject: Revised Update on the Impact of Quality Control Orders (QCOs) on Investment, Capacity Utilization and Import Substitution in Plywood and Wood-Based Boards under QCOs.

Respected Sir,

With reference to our earlier communication (Ref. No. FIPPI Letter dated 4th November 2025, attached as Annexure), the Federation of Indian Plywood and Panel Industry (FIPPI) wishes to submit the revised update on the impact of QCOs on plywood and wood based boards sector through the following points:

- At the outset, FIPPI wishes to submit that prior to implementation of the QCOs, major investments in the wood-based board industry were largely concentrated in the MDF and particle board segments, while the plywood segment remained disproportionately affected by the influx of substandard imports. Between 2021-22 and 2024-25, average annual investments in the wood-based board sector remained in the range of ₹1,500–2,000 crore and were primarily directed towards MDF and particle board capacities, resulting in domestic production in both segments increasing from about 2 million CBM each in 2023-24 to around 4 million CBM each in 2024-25. However, following implementation of the QCOs, the plywood segment has also emerged as an attractive destination for fresh investments.
- As submitted earlier, the QCOs have boosted consumer confidence in high-quality and standardized products, thereby encouraging domestic manufacturers to undertake fresh investments. During 2025-26, investments aggregating to approximately ₹3,600 crore were made across various segments of the industry, of which around ₹600 crore pertains to the plywood segment, while about ₹3,000 crore pertains to the MDF and particle board segments.
- It is further submitted that, based on stakeholder interactions, investments of around ₹200 crore each were undertaken during the previous year in the key plywood manufacturing clusters of Kerala and Yamuna Nagar

(Haryana) towards quality upgradation following implementation of the QCOs. For instance, several units have invested in facilities for manufacture of calibrated plywood and other quality-enhancing technologies.

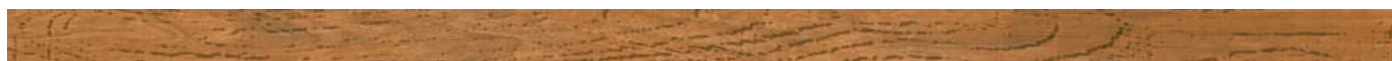
4. The momentum of investment has continued in 2026-27, with announcements relating to both capacity expansion and establishment of new manufacturing facilities. So far, investments of approximately ₹2,500 crore have been announced across the plywood, MDF and particle board segments. Significantly, fresh investments are now expanding into newer geographies, with Madhya Pradesh and Orissa witnessing a major investment announcement in the wood-based board sector for the first time, reflecting the growing geographical diversification of the industry beyond its traditional manufacturing clusters.
5. FIPPI further wishes to highlight that, prior to implementation of the QCOs, a significant influx of substandard imports adversely affected capacity utilization across the domestic industry. However, with increasing import substitution following implementation of the QCOs, manufacturers are not only able to achieve higher utilization of existing capacities but are also undertaking fresh investments for expansion.
6. In the plywood segment, the industry as a whole is now nearing full utilization of its installed capacity of approximately 12 million cubic metres. In the MDF segment, significant capacity additions undertaken in recent years are currently being absorbed by the market, resulting in improved capacity utilization across the industry. In the particle board segment, the 12 manufacturing units operating in Kerala, which were earlier functioning below their installed capacities, are now witnessing improved capacity utilization due to import substitution, while four new plants are coming in the region.

The above developments demonstrate the positive impact of the Quality Control Orders on the plywood and panel industry. The QCOs have not only enhanced consumer confidence in quality-assured products but have also facilitated import substitution, improved capacity utilization, encouraged quality upgradation and stimulated fresh investments across the sector. The continued announcement of new capacities and manufacturing facilities across segments and geographies reflects the growing confidence of domestic industry in a stable and quality-driven market environment. It is therefore requested for continued policy stabilization on QCOs for plywood and wood based boards (MDF and PB).

Thanking You,



Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)



Highlighting the Positive Impact of Quality Control Orders: FIPPI Submits Data on Quality Improvements in Plywood and Wood-Based Boards



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FIPPI/DPIIT/2026-27/14

June 3, 2026

To
Shri Sumeet Jarangal, IAS
Joint Secretary
Department for Promotion of Industry and Internal Trade (DPIIT)
Ministry of Commerce & Industry, Vanijya Bhawan, New Delhi – 110001

Kind Attention:
Shri Mohammad Isharar Ali,
Director, DPIIT.

Subject: Submission of Data on Quality of Plywood & Wood-Based Boards Pre & Post Quality Control Orders (QCO).

Respected Sir,

The Federation of Indian Plywood & Panel Industry (FIPPI) would like to submit the data on quality of plywood and wood-based boards following the implementation of the Quality Control Orders (QCOs).

The Quality Control Orders (QCOs) for plywood and wood-based boards were implemented in 2025, coming into force for large manufacturers in February 2025, for small enterprises in May 2025, and for micro enterprises in August 2025. Prior to the implementation of the QCOs, approximately 20% of the industry comprised the organized sector, while the remaining 80% operated within the Micro, Small and Medium Enterprises (MSME) sector. Based on production capacity, it is estimated that organized-sector manufacturers accounted for about 20% of the compliant production, while MSME units contributed only around 10% compliant production. Consequently, the overall compliance rate of plywood and wood-based boards in the Indian market was estimated at around 30% before QCO implementation.

Following the implementation of the QCOs, the compliance rate of plywood and wood-based boards is estimated to have increased to around 80% at present.

This remarkable improvement reflects the effectiveness of the QCO regime indicating a positive shift in the overall quality of wood-based boards available in the market.

Thanking You,

Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)

Promoting Urea Free Resin Technologies for the Wood-Based Panel Industry: FIPPI Highlights the Transition Towards Urea-Free Resin Systems



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FIPPI/DPIIT/2026-27/15

4 June 2026

To
Shri Sumeet Kumar Jarangal
Joint Secretary
Department for Promotion of Industry and Internal Trade (DPIIT)
Ministry of Commerce & Industry Government of India
Vanijya Bhawan, New Delhi – 110001.

Subject: Initiatives for Promoting Urea-Free Resin Technologies in the Plywood and Wood-Based Panel Sector.

Respected Sir,

The Federation of Indian Plywood & Panel Industry (FIPPI) wishes to highlight the significant efforts being undertaken by the plywood and wood-based panel industry towards the development and adoption of bio-based, urea-free resin technologies.

The wood-based panel industry constitutes an important segment of India's manufacturing sector, producing a wide range of products including plywood, blockboards, flush doors, particleboards, medium-density fibreboards (MDF), etc. Resins play a critical role in bonding wood particles, veneers, and fibres together and are therefore fundamental to the performance and durability of these products. The industry uses three types of formaldehyde-based resins, Phenol Formaldehyde (PF) for Boiling Waterproof (BWP), Melamine Formaldehyde (MF) for Boiling Water Resistant (BWR) and Urea Formaldehyde (UF) for Moisture Resistant (MR) wood-based boards. MR-grade boards are predominantly manufactured by MSMEs, which use urea-based resins. Urea Formaldehyde (UF) resin has been the most widely used adhesive system in the plywood and wood-based panel industry owing to its low cost, fast curing characteristics, and satisfactory bonding performance. However, growing concerns regarding formaldehyde emissions and environmental sustainability, coupled with uncertainties in the supply and rising cost of imported urea, have accelerated the search for safer and more sustainable adhesive systems.

Moreover, the present global scenario, including disruptions in international supply chains arising from the ongoing West Asia crisis, presents an opportunity for manufacturers to transition towards bio-based (urea-free) adhesive systems, including those based on soya and flour. Soya-based resins have demonstrated low formaldehyde emissions, satisfactory performance, and commercial viability without compromising product quality or significantly increasing production costs.

The plywood and panel industries particularly, the MSMEs are currently undergoing a significant technological transition towards the adoption of bio-resins adhesive systems. Encouragingly, 25-30 industries have already transitioned to bio-based resin systems in their production processes.

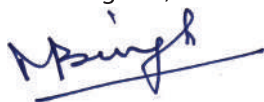
Research institutions have also been actively contributing to this transformation. The Institute of Wood Science & Technology (IWST), Bengaluru, has been undertaking research on bio-based (soya-flour) resin systems with a focus on improving bond quality and enhancing economic feasibility for commercial applications. The extension and adoption of bio-based (soya) adhesives has already been implemented for the plywood segment, while research efforts are currently being undertaken for their use in MDF and particleboard segments.

Recognizing the growing importance of urea free resin technologies and their potential to transform the plywood and panel industry, the Federation of Indian Plywood & Panel Industry (FIPPI), in collaboration with the Institute of Wood Science & Technology (IWST), Bengaluru, is organizing a seminar on "Innovative Approaches on the Development of Urea Free Resin: Open Discussion & Need for Validation" on the occasion of World Environment Day, 5th June 2026. The key topics for the seminar include:

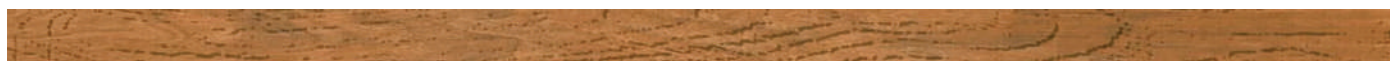
1. Development and Extension of Alternatives and Substitution to Urea Resins
2. Practical approaches to implementation of Non-Urea MR Grade Plywood Resins in India

FIPPI remains committed to supporting research, innovation, and industry-wide adoption of sustainable adhesive technologies, with the objective of facilitating a progressive transition towards bio-based and urea-free resin systems in the plywood and wood-based panel sector. We firmly believe that within the next one year, a substantial proportion of plywood manufacturing units will transition towards bio-resin systems, thereby reducing or eliminating dependence on urea-based inputs in this segment.

Thanking You,



Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)



Draft Eco Mark Criteria for Wood and Wood Substitute Products For Comments

रजिस्ट्री सं. डी.एल.- 33004/99

REGD. No. D. L.-33004/99



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असाधारण

EXTRAORDINARY

भाग II—खण्ड 3—उप-खण्ड (i)

PART II—Section 3—Sub-section (i)

प्राधिकार से प्रकाशित

PUBLISHED BY AUTHORITY

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नई दिल्ली, सोमवार, जून 8, 2026/ज्येष्ठ 18, 1948

No. 405]

NEW DELHI, MONDAY, JUNE 8, 2026/JYAISTHA 18, 1948

MINISTRY OF ENVIRONMENT, FOREST, AND CLIMATE CHANGE

NOTIFICATION

New Delhi, the 8th June, 2026

G.S.R. 452(E).— WHEREAS, the Ecomark Rules, 2024 were published in the Gazette of India, Extraordinary, Part II, Section 3, Sub Section (ii), vide GSR. 596(E), dated the 26th September, 2024.

AND WHEREAS section (3) (i) of the Ecomark Rules, 2024, provides that Ecomark may be granted to a product which has a license or a certificate of conformity of Indian Standards granted under the Bureau of Indian Standards Act, 2016 and/or a mandate of the Quality Control Orders issued by the Central Government, and fulfils the criteria for grant of Ecomark specified under the corresponding entries under column (3) of the First Schedule.

AND WHEREAS Sub-Section (1(b)) of Section 9 of the Ecomark Rules, 2024 provides that the functions of the Central Pollution Control Board shall include reviewing and developing the criteria for grant of Ecomark, based on the knowledge available, technological and market developments, and the criteria being followed in other countries and make recommendation to the Steering Committee.

AND NOW, THEREFORE in exercise of the powers conferred by Section 3, Section 6 and Section 25 of the Environment (Protection) Act, 1986 (29 of 1986), and Sub-Section (1(b)) of Section 9 of the Ecomark Rules, 2024, the Central Government hereby specify the amendments to S.No 1, 3, 6, 11, 15 and 17 of THE FIRST SCHEDULE under the Ecomark Rules, 2024 for the information of the public likely to be affected thereby and notice is hereby given that the said notification will be taken into consideration on or after the expiry of a period of 60 days from the date of publication of the draft in the official Gazette;

The objections or suggestions, which may be received from any person with respect to the said Notification within the period specified above, will be taken into consideration by the Central Government;

Objections or suggestions, if any, may be addressed to the Joint Secretary, Ministry of Environment, Forest and Climate Change, Indira Paryavaran Bhawan, Jor Bagh road, New Delhi - 110003, and may be sent to e-mail id: sohsm-d-mef@gov.in .

D. In THE FIRST SCHEDULE (PRODUCTS AND CRITERIA FOR GRANT OF ECOMARK), serial number 11 (Wood Substitutes) shall be substituted, namely: -

	Product	Criteria for grant of Ecomark
(1)	(2)	(3)
11	Wood and Wood Substitute Products	General Criteria i. All product manufacturers of wood and wood substitute shall meet the applicable and relevant Indian Standards of Bureau of Indian Standards (BIS) pertaining to quality and performance. ii. Product manufacturers must produce the copy of Consent to Establish (CTE) and Consent to Operate (CTO) issued by the respective State Pollution Control Board (SPCB)/Pollution Control Committee as per the provisions of the Water (Prevention and Control of Pollution) Act, 1974 and the Air (Prevention and Control of Pollution) Act, 1981, along with the Authorization, if required, under the Environment (Protection) Act, 1986 and rules made thereunder. iii. Product packaging shall bear a QR Code specifying the criteria based on which the product has been labelled as ECOMARK. Specific Criteria i. Unit shall ensure 100% utilization of wood from agroforestry/plantation timber such as Poplar, Eucalyptus, Rubber etc. or timber/veneers sourced from certified forest management in India or imported for Plywood manufacturing. ii. Unit shall ensure maximum up to 80% utilization of wood from agroforestry/plantation timber such as Poplar, Eucalyptus, Acacia, etc. or that sourced from certified forest management in India or imported and at least 20% from wood waste/Bamboo/agricultural residues for Medium Density Furniture (MDF)/ High Density Furniture (HDF) manufacturing. iii. Unit shall ensure more than 80% utilization of wood residues, waste wood (from industries such as plywood, etc. and wood demolition), sawdust, recycled wood and agriculture residues (bagasse, rice husk, cotton stalk, coir fibre, rice straw etc.) and up to 20% from certified wood from agroforestry/plantation timber such as Poplar, Eucalyptus, Acacia, Bamboo, etc. for Particle board manufacturing. iv. Unit shall ensure 100% use of agricultural residues (rice straw, bagasse, cotton stalk, mustard straw, etc.) and wood residues (sawdust, shavings, etc.) with blending of at least 80% agricultural residue (with minimum 50% paddy straw) and remaining wood residue for biomass briquette/pellet manufacturing. v. Unit shall ensure at least 80% utilization of gypsum from fertilizer plant or other industrial by-products for Synthetic gypsum board/panel manufacturing. vi. Unit shall ensure that all applicable raw material complies with specific requirements mentioned in Ecomark Criteria or certified under Ecomark for furniture. vii. Use of adhesives/binders/resins from natural source such as soya, lignin, starch, cardanol, etc., should be $\geq 20\%$ for manufacturing of Plywood, Particle Board, MDF/HDF and Furniture. viii. Usage of non-biodegradable material is restricted in furniture, doors, window frames and shutters to a 20% by weight in product material composition. Use of plastic is prohibited.

		ix. Use of Anti-Termite repellents on Plywood, Particle Board, MDF/HDF and Furniture should be free from Chlordane and Organophosphates. x. Use of Antimony Oxides is prohibited as flame retardants for manufacturing of Plywood, Particle Board and MDF/HDF board. xi. Limit Formaldehyde content (Fc) as per BIS standard; IS 3087:2005: IS 12406: 2021, IS 14587:2023 i.e. Formaldehyde class E1: $F_c \leq 8 \text{ mg/100 g}$ of oven dry sample of product i.e. Plywood, Particle Board, MDF/HDF and Furniture xii. Limit content of Lead (Pb) < 50mg/kg and Cadmium (Cd) < 0.5 mg/kg in synthetic resins for manufacturing of Plywood, Particle Board, MDF/HDF and Furniture. xiii. Limit VOC content in Adhesives to <5% (weight by weight) for manufacturing of Plywood, Particle Board, MDF/HDF and Furniture. xiv. Briquettes/ pellets must have moisture & ash content <12% and calorific value >3400 kcal/kg. xv. The manufacturing unit must meet the prescribed effluent & emission discharge standard for all the notified parameters before its disposal and shall submit treated effluent/emission laboratory test results from the Environment (Protection) Act (EPA), 1986/National Accreditation Board for Testing and Calibration Laboratories (NABL) recognized/accredited laboratory. xvi. Unit shall ensure traceability for all raw material. xvii. Adequate permanent emission monitoring facilities as per CPCB Emission Regulation Part III should be installed. xviii. Fugitive dust emissions shall be minimized with APCDs, covered storage, cleaner fuels, and boundary walls. xix. All packaging materials shall be recyclable/biodegradable or comply with EPR norms. xx. A lifecycle assessment (LCA) report shall be submitted. xxi. Solid & Hazardous waste generated (if any) shall be disposed of as per the applicable Rules/SOP and shall submit the manifest w.r.t. Hazardous waste disposal for the last 02 years. xxii. Any paints, primers, varnishes or any other coating on Plywood, Particle Board, MDF/HDF, Synthetic gypsum board/panel and Furniture used shall be ECOMARK Certified. xxiii. Unit should take measures to reduce energy consumption of the plants and measures to reduce specific water consumption. xxiv. 100 % waste material utilization in the production process or in the boiler/ Thermic Fluid Heater. Else, submit manufacturing unit-level recycling plan for the next 3 years. xxv. Consumer sensitization plan should be prepared on sustainability features & product end of life instructions to ensure recycling or reuse. xxvi. The manufacturer shall possess a valid ISO 14001:2015 certificate.
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Putting Agroforestry at the Centre of India’s Trade Policy

Why Made-in-India Wood Panel Products Deserve a Place in the Exclusion List in Future FTA Negotiations

1. India’s Evolving FTA Landscape

The global trading environment changed significantly following the announcement of sweeping tariff measures by the United States in April 2025. As countries looked to diversify their export markets and strengthen trade ties with new partners, Free Trade Agreements (FTAs) gained renewed importance. India also used this opportunity to accelerate its FTA agenda. In recent years, the country has concluded major trade agreements with the UK, Oman, EFTA, Australia and UAE, while actively negotiating similar agreements with several other trading partners, including the United States. These negotiations aim to reduce tariff and non-tariff barriers, establish transparent and predictable trade rules, and improve market access for Indian businesses.



Figure 1: India’s FTA Landscape at a Glance.

Currently, India has 15 FTAs in force, covering 27 countries and accounting for nearly 28.5 per cent of India’s exports and 32.2 per cent of its imports. As India’s FTA network continues to expand, these agreements are becoming an increasingly important pillar of the country’s trade and economic strategy.

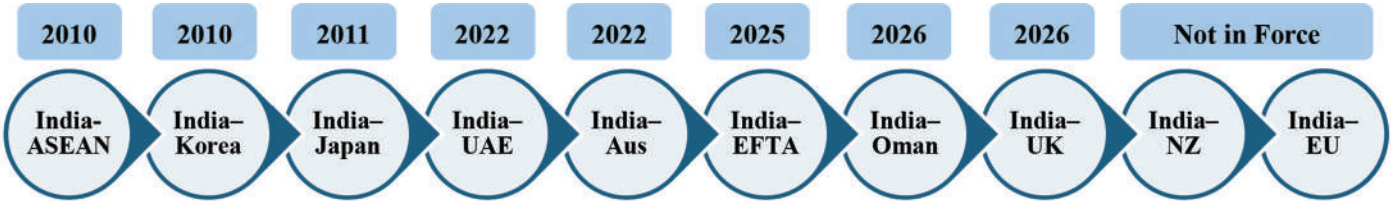


Figure 2: Timeline of India’s Free Trade Agreements (2010–2026).

2. India’s Tariff Commitments on Imports of Wood Panel Products under FTAs

Table 1: India’s Tariff Commitments on Imports of Wood Panel Products under Free Trade Agreements (FTAs)	
Free Trade Agreement (FTA)	India’s Tariff Commitments on Imports of Wood Panel Products
India-New Zealand FTA (Implementation Pending)	Immediate tariff elimination for all plywood products and the majority of MDF and particle board products, while coir- and jute fibre-based MDF and particle board products are excluded.
India–UK CETA	Immediate tariff elimination across all three product categories.
India–Oman CEPA	Combination of immediate tariff elimination and 5- and 7-year phased tariff elimination.
India–EFTA TEPA	Iceland: 7-year phased tariff elimination for the majority of products, while Jute Fibre MDF and Coir Particle Boards excluded. Norway: 5-year phased tariff elimination for the majority of products.

	Switzerland & Liechtenstein: Immediate tariff elimination for the majority of products, while Coir Particle Boards excluded.
India–Australia ECTA	Immediate tariff elimination for all plywood products and the majority of MDF and particle board products, while coir- and jute fibre-based MDF and particle board products excluded.
India–UAE CEPA	Immediate tariff elimination across all three product categories.
India–Japan CEPA	11-year phased tariff elimination across all three product categories.
India–Korea CEPA	8-year phased tariff elimination for all plywood products and the majority of MDF products, while 11-year phased tariff elimination for all particle board products.
ASEAN–India Trade in Goods Agreement (AITIGA)	ASEAN-5 (Brunei, Indonesia, Malaysia, Singapore, Thailand) & CLMV (Cambodia, Laos, Myanmar, Vietnam): 4-year phased tariff elimination for all plywood and particle board products, while 7-year phased tariff elimination for all MDF products. Philippines: 9-year phased tariff elimination for all plywood and particle board products, while 10-year phased tariff elimination for all MDF products.

A comparative analysis of India’s tariff commitments on imports of wood panel products under various FTAs reveals the following key trends:

- Predominantly Liberalizing Tariff Commitments**
India’s tariff commitments for wood panel products have been predominantly liberalizing in nature. Across most FTAs, plywood, MDF and particle board products are subject to either immediate tariff elimination or phased tariff elimination over specified timeframes. Products retained under the ‘Exclusion List’ remain relatively limited.
- Recent FTAs Reflect Faster Tariff Liberalization**
The pace of tariff liberalization has accelerated in India’s recent FTAs. While earlier agreements generally provided phased tariff elimination over different timeframes, recent agreements such as the India–UK CETA provide immediate tariff elimination across all three product categories.
- Selective Protection for Rural Economy-Linked Products (Coir- and Jute Fibre-Based MDF and Particle Board Products)**
Despite the broader trend towards tariff liberalization for products under HSN Codes 4412, 4411 and 4410, products retained under the ‘Exclusion List’ are primarily limited to coir- and jute fibre-based MDF and particle board products. Agreements such as the India–Australia ECTA, India–EFTA TEPA and the India–New Zealand FTA exclude these products from tariff liberalisation, recognising their strong linkages with the rural economy. However, despite the Indian wood panel industry also being intrinsically linked with farmers through agroforestry and contributing significantly to rural livelihoods, wood panel products have not been included under the ‘Exclusion List’ in India’s FTAs.

3. Policy Rationale for the Inclusion of Wood Panel Products under the Exclusion List

The analysis presented above shows that India’s FTAs have already adopted a differentiated approach by protecting rural economy-linked products through their inclusion under the ‘Exclusion List’. In this context, FIPPI believes that Made-in-India wood panel products also deserve similar treatment in future FTA negotiations. This recommendation is based on four key considerations: the industry’s unique dependence on ‘Agriwood’ sourced through agroforestry, its contribution to strengthening farmers’ incomes, its role in supporting rural livelihoods and making agriculture more sustainable, and the additional climate change mitigation benefits arising from the expansion of agroforestry.

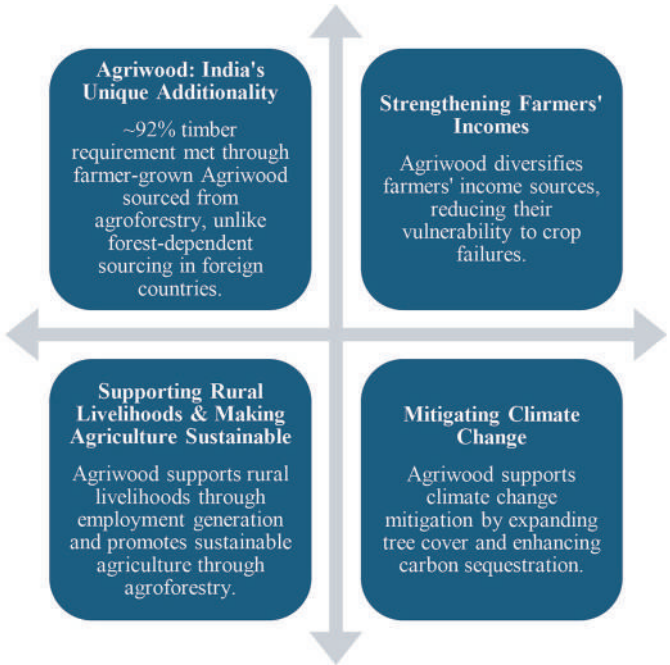


Figure 3: Policy Rationale for the Inclusion of Wood Panel Products under the Exclusion List

- Agriwood: India's Unique Additionality**

Wood is globally recognised as one of the most sustainable building materials owing to its renewable nature, low embodied energy, carbon storage potential and low greenhouse gas (GHG) emissions. However, these characteristics are common to wood products irrespective of their country of origin. India's unique additionality lies in its Agriwood-based production model. Presently, nearly 92% of the domestic industry's timber requirement is met through Agriwood sourced from agroforestry, without disturbing natural forests, while the remaining requirement is met through imports owing to the unsuitability of domestic agroforestry species for the manufacture of face veneers (excluding reconstituted veneers).

In contrast, foreign wood panel manufacturers continue to source timber through forest leasing arrangements, highlighting the additionality of India's unique agroforestry-based, farmer-centric production model.

- Strengthening Farmers' Incomes**

Industrial demand for Agriwood enables farmers to diversify their income sources beyond conventional crop cultivation. Unlike seasonal crops, which are often vulnerable to weather uncertainties and market fluctuations, income from Agriwood provides farmers with an additional and relatively stable source of revenue, reducing the financial risks associated with crop failures. Safeguarding the country's Agriwood ecosystem is therefore essential for supporting farmers' incomes and advancing the national objective of 'Doubling Farmers' Incomes'.

- Supporting Rural Livelihoods & Making Agriculture Sustainable**

The Agriwood value chain generates substantial livelihood opportunities across rural India, spanning nursery development, tree cultivation, harvesting, transportation, timber trading and wood-based manufacturing. By creating employment within rural areas, it reduces the need for distress-driven rural-to-urban migration while strengthening local rural economies.

Beyond its contribution to rural livelihoods, growing demand for Agriwood encourages greater adoption of agroforestry. By integrating trees with crops and livestock, agroforestry helps prevent soil erosion, enhances soil fertility and improves water retention, thereby making agriculture more productive, resilient and sustainable. Safeguarding India's Agriwood ecosystem therefore supports rural livelihoods while advancing the long-term sustainability of Indian agriculture.

- Mitigating Climate Change**

Beyond its contribution to farmers' incomes and rural livelihoods, the Agriwood ecosystem also plays an important role in mitigating climate change. By encouraging greater adoption of agroforestry, it expands tree cover outside forests (ToF) and enhances carbon sequestration. Moreover, even after timber is harvested and converted into plywood and panel products, carbon absorbed during tree growth remains locked within the wood for several decades, extending its climate benefits.

Safeguarding India's Agriwood ecosystem therefore contributes not only to rural development but also to India's broader climate commitments, including its updated Nationally Determined Contribution (NDC) target of creating an additional carbon sink of 3.5–4 billion tonnes of CO₂ equivalent through forests and tree cover by 2035.

FIPPI's Policy Recommendation

FIPPI proposes that wood panel products (HSN 4412, 4411 and 4410) be included under the 'Exclusion List' in India's future Free Trade Agreement (FTA) negotiations.

Like coir- and jute fibre-based panel products, the Indian wood panel industry is also intrinsically linked with farmers through Agriwood sourced from agroforestry. Any tariff liberalization of such products could adversely affect farmers' incomes, rural livelihoods and the continued adoption of agroforestry.

Therefore, extending similar policy treatment to wood panel products would help align India's trade policy with its broader national priorities of strengthening farmers' incomes, supporting rural livelihoods, mitigating climate change and promoting agroforestry to make Indian agriculture more productive, resilient and sustainable.□



India's Plywood & Panel Imports: A Changing Landscape



Rishabh Gandhi
Economic Officer, Federation of Indian Plywood & Panel Industry (FIPPI)

1. Why Import Trends Matter

Over the past year since the implementation of the Quality Control Orders (QCOs) in February 2025, India's plywood and panel sector has undergone a significant structural transformation. Far from being merely regulatory requirements for domestic and foreign manufacturers to comply with, these orders have emerged as key drivers of change—transitioning the sector from an import-vulnerable and fragmented industry towards one that is more transparent, quality-conscious, disciplined and investment-ready.

Among the various indicators of this transformation, import trends are the most direct and measurable indicator of the effectiveness of the QCOs. One of the key objectives behind the implementation of these QCOs on plywood and panel products was to restrict the entry of substandard products into the Indian market. Therefore, it becomes necessary to assess these import trends in order to evaluate the effectiveness of the QCO framework.

2. Assessing India's Changing Import Landscape

2.1 Evolution of Import Trends

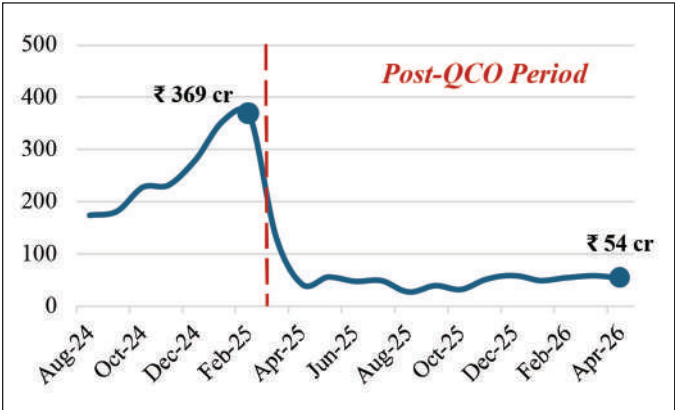


Figure 1: Monthly Trend in India's Plywood Imports (₹ crore).

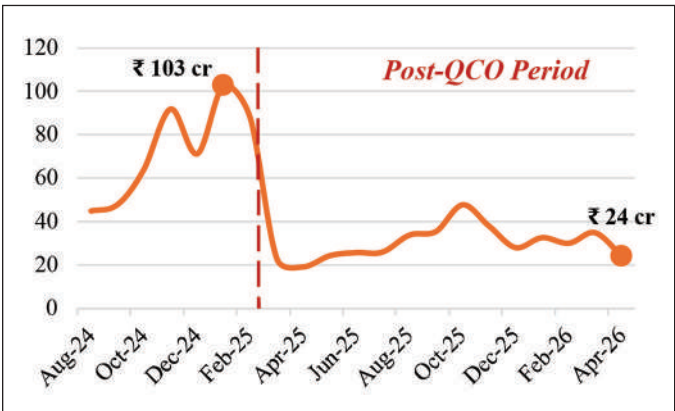


Figure 2: Monthly Trend in India's MDF Imports (₹ crore).

In the months leading up to the enforcement deadline of the QCOs, imports of plywood and panel products increased sharply due to stockpiling by importers. India's plywood imports peaked at ₹369 crore in February 2025, while MDF and particle board imports reached their highest monthly levels of ₹103 crore and ₹27 crore in January 2025 and November 2024, respectively.

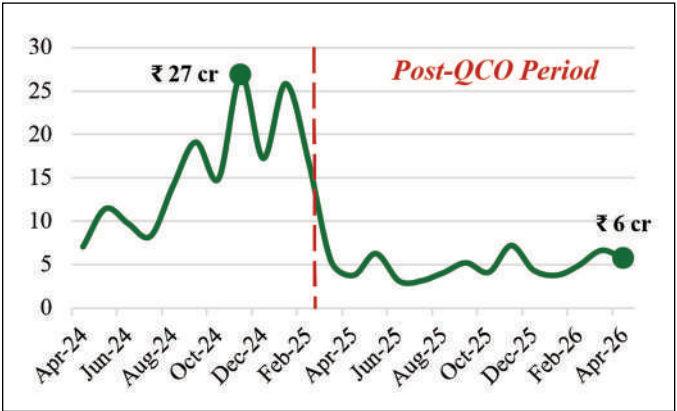


Figure 3: Monthly Trend in India's Particle Board Imports (₹ crore).

However, this rising trend reversed following the implementation of the QCOs. Imports across all three product categories declined sharply and remained well below their pre-QCO levels in the subsequent months, with no significant rebound observed so far.

During April 2026, India's imports of plywood, MDF and particle board stood at ₹54 crore, ₹24 crore and ₹6 crore, respectively. The sustained moderation across all three product categories suggests that the post-QCO decline is not merely a short-term response to the regulatory transition but reflects a broader structural adjustment in import patterns across India's plywood and panel sector.

2.2 Source Country-wise Distribution of Imports

2.2.1 Plywood

Trade data indicates that, over the past few months, more than 90% of India's plywood imports have been concentrated among three countries—Nepal, China and Vietnam. In April 2026, nearly 72% of India's plywood imports, valued at ₹39 crore, originated from Nepal, followed by Vietnam and China with shares of 12% and 8%, respectively.

However, data available on the BIS portal under the

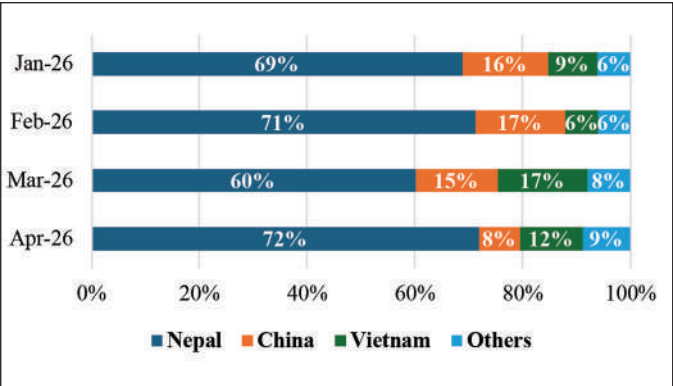


Figure 4: Source Country-wise Distribution of India's Plywood Imports (in %).

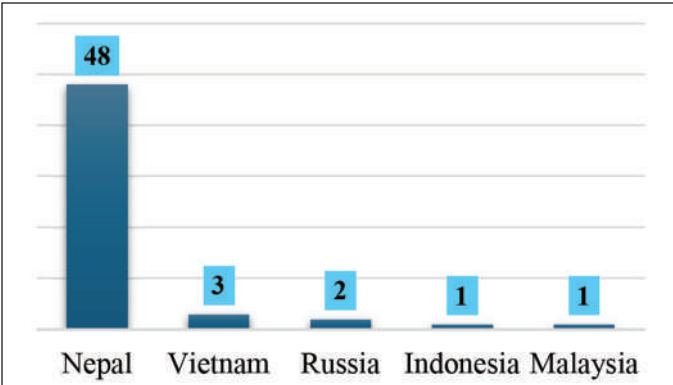


Figure 5: Number of Foreign Manufacturers Holding BIS Licenses for Plywood, by Country.

Foreign Manufacturers Certification Scheme (FMCS) shows that a total of 55 foreign manufacturers currently hold valid BIS licences for plywood. Of these, 48 manufacturers are based in Nepal, followed by 3 in Vietnam, 2 in Russia, and 1 each in Indonesia and Malaysia.

Despite no China-based manufacturer currently holding a valid BIS licence for plywood, a substantial share of India's plywood imports continues to originate from China. This raises important questions regarding compliance with the QCOs framework.

2.2.2 MDF

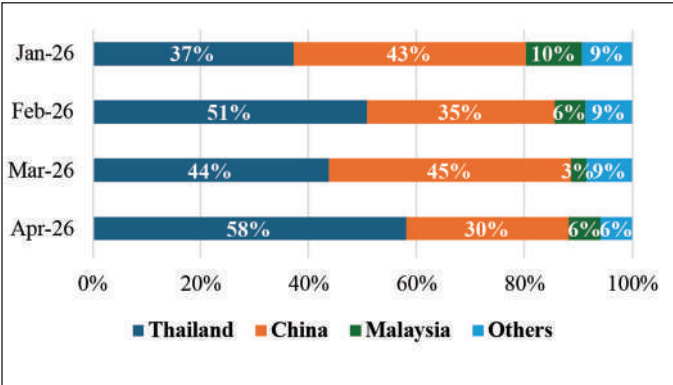


Figure 6: Source Country-wise Distribution of India's MDF Imports (in %).

Similar to the plywood segment, the MDF segment also exhibits a high concentration of imports among a few major source countries. Together, Thailand, China and Malaysia

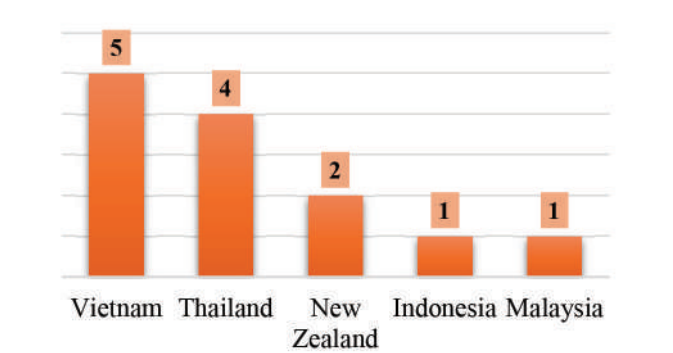


Figure 7: Number of Foreign Manufacturers Holding BIS Licenses for MDF, by Country.

accounted for more than 90% of India's MDF imports over the past few months. In April 2026, Thailand accounted for nearly 58% of India's MDF imports, valued at ₹14 crore, followed by China and Malaysia with shares of 30% and 6%, respectively.

Data available on the BIS portal under the Foreign Manufacturers Certification Scheme (FMCS) shows that a total of 13 foreign manufacturers currently hold valid BIS licences for MDF. Of these, 5 manufacturers are based in Vietnam, followed by 4 in Thailand, 2 in New Zealand, and 1 each in Indonesia and Malaysia.

A comparison of the source country-wise distribution of India's MDF imports with the distribution of foreign BIS-licensed manufacturers once again draws attention to China. While China continues to remain one of the largest source countries for India's MDF imports, no China-based manufacturer currently holds a valid BIS licence for any category of MDF. This raises important questions regarding enforcement mechanisms with the QCOs framework.

2.2.3 Particle Board

Compared to the plywood and MDF segments, India's particle board imports are relatively more diversified across source countries. Over the past few months, Bhutan, Thailand, Malaysia and China have emerged as the major source countries for India's particle board imports, collectively accounting for nearly 86% of imports in April 2026. In April 2026, Bhutan accounted for about 38% of India's particle board imports, valued at ₹2 crore, followed by Thailand,

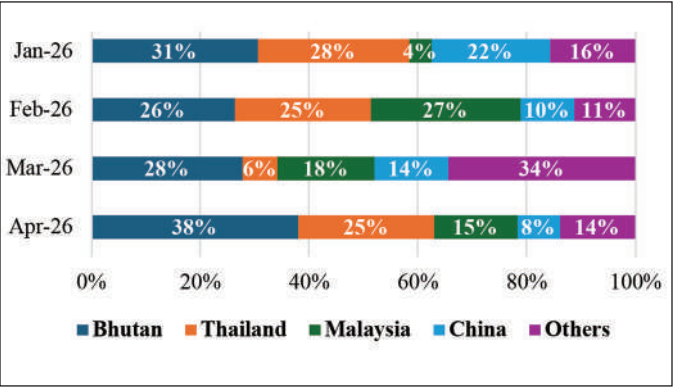


Figure 8: Source Country-wise Distribution of India's Particle Board Imports (in %).

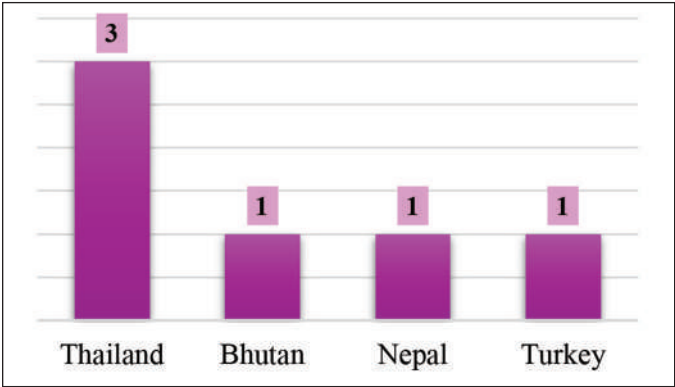


Figure 9: Number of Foreign Manufacturers Holding BIS Licenses for Particle Board, by Country.

Malaysia and China with shares of 25%, 15% and 8%, respectively.

However, data available on the BIS portal under the Foreign Manufacturers Certification Scheme (FMCS) shows that only 6 foreign manufacturers currently hold valid BIS licences for particle board. Of these, 3 manufacturers are based in Thailand, while Bhutan, Nepal and Turkey account for 1 manufacturer each.

This suggests that the particle board segment presents greater compliance concerns than the plywood and MDF segments. While China was the only major source country without any valid BIS licence in the plywood and MDF segments, both Malaysia and China continue to account for a notable share of India’s particle board imports despite no manufacturers from these countries currently holding valid BIS licences for particle board.

3. Key Observations

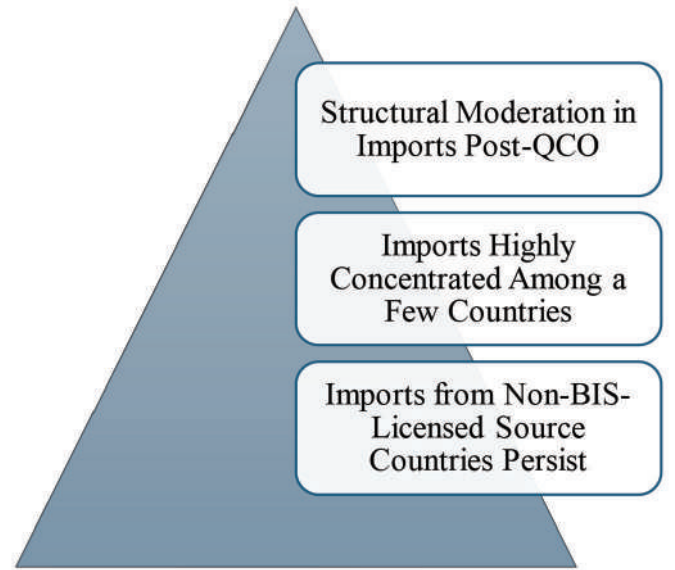


Figure 10: Key Findings from India’s Plywood & Panel Import Trends in the Post-QCO Period.

The analysis of import trends, source country distribution and foreign BIS licence data in the post-QCO period reveals the following key observations:

- **Structural Moderation in Imports Post-QCO:** The import trends indicate that the sharp decline observed immediately after the enforcement of the QCOs was not merely a temporary adjustment associated with the regulatory transition. Instead, imports across all three product categories have remained at relatively lower levels over the subsequent months, with no significant rebound observed so far, suggesting that the QCO framework has led to a structural moderation in India’s plywood and panel imports.
- **Imports Highly Concentrated Among a Few Countries:** Another notable observation emerging from the analysis is that India’s plywood and panel imports are largely concentrated among a few major source countries. This pattern has remained broadly consistent over the past few months. In April 2026, more than 90% of India’s plywood and MDF imports originated from just three major source countries, while over 80% of particle board imports originated from only four source countries.
- **Imports from Non-BIS-Licensed Source Countries Persist:** The comparison of source country-wise import distribution with the distribution of foreign BIS-licensed manufacturers reveals that imports continue to originate from countries where no manufacturers currently hold valid BIS licences for the respective product categories. This pattern is evident across plywood, MDF and particle board, highlighting the need for continued monitoring of import patterns to ensure the effective implementation of the QCO framework.

4. Conclusion

Now, with over a year having passed since the implementation of the QCOs, India’s plywood and panel import landscape reflects significant structural changes. The sustained moderation in imports across all three product categories indicates that the QCO framework has been largely effective in restricting imports from foreign manufacturers not holding valid BIS licences, thereby strengthening the quality-driven ecosystem in the country.

However, certain gaps in the effective implementation of the QCO framework continue to persist, as reflected by the continued presence of countries among India’s major import sources despite no manufacturers from these countries currently holding valid BIS licences for the respective product categories. These observations highlight the need for continued monitoring and strengthened enforcement to fully realise the intended objectives of the QCO framework.

Sources:

- DGCI&S, Ministry of Commerce and Industry (HS Codes: 4412, 4411 and 4410).
- Bureau of Indian Standards (BIS) – Foreign Manufacturers Certification Scheme (FMCS) Licensee Database.□

Ensuring Competitively Priced Industrial Inputs for Downstream Manufacturing Industries: FIPPI Requests Withdrawal of the Anti-Dumping Investigation on Phenol Imports



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/Commerce/2026-27/01

June 3, 2026

To,
Shri Rajesh Agarwal, IAS
Commerce Secretary,
Ministry of Commerce and Industry
Vanijya Bhawan, New Delhi.

Subject: Representation Regarding DGTR-Initiated Anti-Dumping Investigation on Phenol Imports from Korea RP, Saudi Arabia, Singapore, South Africa, Taiwan, Thailand and the United States of America.

Respected Sir,

We wish to respectfully refer to the recent initiation of anti-dumping investigation by the Directorate General of Trade Remedies (DGTR) concerning imports of phenol (HSN Codes 29071110 and 29071190) originating in or exported from Korea RP, Saudi Arabia, Singapore, South Africa, Taiwan, Thailand and the United States of America (Ref. No. 11/21/2026-DGTR dated 19th March 2026).

The present investigation assumes significance particularly at a time when global supply chains and international trade flows continue to remain vulnerable owing to the prevailing geopolitical disruptions in West Asia. Any additional trade restrictions on critical industrial raw materials such as phenol may therefore have significant downstream implications for manufacturing sectors dependent upon such imports.

In this regard, we also wish to draw your kind attention towards the earlier anti-dumping investigation initiated by DGTR concerning imports of melamine (HSN Code 29336100) from China PR (Ref. No. 6/40/2025-DGTR dated 29th September 2025). At that stage as well, the Federation of Indian Plywood and Panel Industry (FIPPI) had opposed the initiation of anti-dumping proceedings on industrial raw materials constituting critical inputs for downstream manufacturing sectors. FIPPI had respectfully submitted that imposition of anti-dumping duty on such industrial inputs disproportionately increases the cost burden on downstream user industries, thereby adversely affecting the competitiveness of Indian manufactured products vis-à-vis imported finished goods in both domestic and international markets (Ref. No. FIPPI/ADD1/Melamine/2025-26 dated 3rd November 2025).

FIPPI wishes to highlight that phenol occupies a critical position in the Indian manufacturing ecosystem, particularly in the plywood and panel industry, wherein phenol-based resins are extensively used for the manufacture of plywood and panel products. Importantly, the adoption of bio-based adhesives is still under development, thus, presently there exist no viable substitutes for phenol-based resins. A comparative analysis of domestic production and import data indicates that despite substantial improvement in domestic phenol production during the proposed injury period, phenol imports into India also continued to increase simultaneously, indicating that imports continue to fulfil a significant portion of

India’s domestic demand requirements. It is also pertinent to note that the domestic industry continued to undertake exports during the proposed injury period alongside increasing domestic production, which raises important concerns regarding the alleged injury claimed by the domestic industry (**Annexure 1**).

Further, the international export pricing analysis indicates that export prices of phenol from the subject countries to India broadly remained aligned with prices prevailing across other major international markets, without indicating any India-specific abnormal pricing pattern. In several instances, phenol exports from the subject countries were supplied to other international markets at prices comparable to or even lower than export prices to India, despite which anti-dumping measures have generally not remained in force across major importing countries. This reflects the broader international approach of permitting continued access to competitively priced phenol imports considering phenol’s importance as a critical industrial input for several downstream manufacturing sectors (**Annexure 2**).

In view of the above, FIPPI respectfully submits that it is wholly unjustifiable to extend further benefits in the form of protectionist measures to the domestic phenol industry, particularly when the domestic industry is already highly concentrated with only two manufacturers namely Hindustan Organic Chemicals Ltd. (HOCL) and Deepak Phenolics Ltd. (DPCL). Any imposition of anti-dumping duty on phenol imports would come at the expense of increased production costs for several downstream manufacturing sectors dependent upon phenol as a critical industrial input.

FIPPI has consistently advocated for reduction in the production costs of domestically manufactured products so as to enhance their competitiveness in export markets. Any imposition of anti-dumping duty on phenol imports would reduce the cost competitiveness of domestically manufactured wood panel products vis-à-vis imported finished products, thereby enabling imported wood panel products to capture a larger share of the domestic market. This would adversely affect domestic manufacturing, demand for agroforestry-based timber, employment generation and overall domestic value addition within the country, while also resulting in foreign exchange outflows, which remain particularly significant in the present global trade environment.

Thanking You,


Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)

Annexure I

India’s Domestic Phenol Market Structure and Import Dependence on Subject Countries

1.0 Application-wise Distribution of Phenol Consumption in India

Phenol occupies a distinctive position in the Indian manufacturing ecosystem, not as a finished product but as a core intermediate input that directly determines the quality and performance of downstream manufactured products.

Its usage in India is broad and multi-sectoral; however, nearly 60% of total phenol consumption is in the form of phenol formaldehyde resins, which are further used in sectors such as wood panels, automobiles, aviation, electronics and allied industries. From the perspective of the Indian plywood and panel industry, phenol-based resins are critical for manufacturing wood panel products requiring high bonding strength, moisture resistance and durability. Further, there are no viable substitutes for phenol-based resins in several critical applications in India. Therefore, for downstream industries dependent on phenol-based resins, phenol is not a discretionary raw material but a technical necessity directly affecting product quality, compliance with standards and market acceptance.

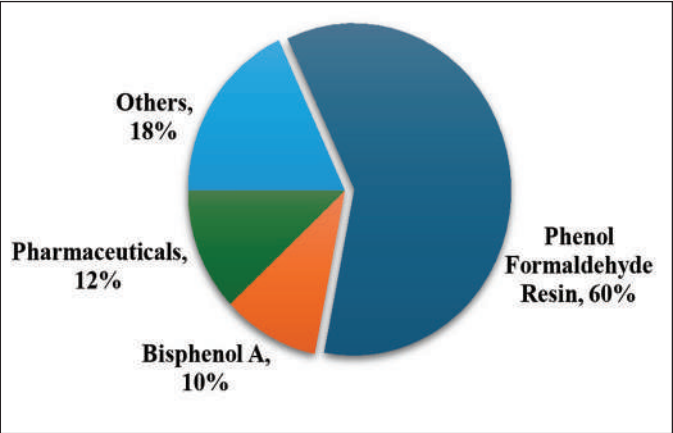


Figure 1: Application-wise Distribution of Phenol Consumption in India.

2.0 India’s Domestic Phenol Market Structure and Import Dependence

Table 1: Overview of India’s Phenol Production and Trade Trends (in thousand metric tons).

Year	Hindustan Organic Chemicals’ Phenol Production	Deepak Phenolics’ Phenol Production	Total Domestic Phenol Production	India’s Phenol Imports	India’s Phenol Exports
2022-23	37	240	277	218	17
2023-24	48	303	351	238	25
2024-25	35	334	369	260	17

The domestic phenol industry in India presently comprises only two manufacturers, namely Hindustan Organic Chemicals Ltd. (HOCL) and Deepak Phenolics Ltd. (DPCL). As reflected in Table 1, domestic phenol production in India increased from 277 thousand metric tons in 2022-23 to 369 thousand metric tons in 2024-25. However, despite the substantial increase in domestic production during the proposed injury period, phenol imports into India also continued to increase simultaneously, indicating that imports continue to fulfil a significant portion of India’s domestic demand requirements.

It is also pertinent to note that the domestic industry continued to undertake exports during the proposed injury period. The continued increase in domestic production alongside sustained exports by the domestic industry raises serious questions regarding the alleged injury claimed by the domestic industry.

Table 2: India’s Import Dependence on Subject Countries for Phenol.

Year	India’s Total Phenol Imports (in thousand metric tons)	India’s Phenol Imports from Subject Countries (in thousand metric tons)	Share of Subject Countries in India’s Total Phenol Imports (in %)
2018-19	232	214	92%
2019-20	144	134	93%
2020-21	171	134	78%
2021-22	206	97	47%
2022-23	218	166	76%
2023-24	238	201	84%
2024-25	260	240	92%

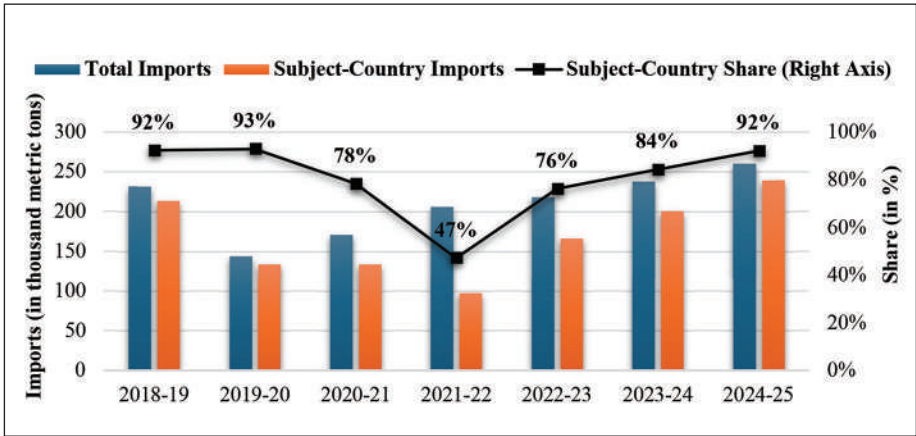


Figure 2: Trends in the Share of Subject Countries in India’s Phenol Imports.

As reflected in Table 2, imports from the subject countries continue to constitute a dominant share of India’s total phenol imports. During 2024-25, approximately 92% of India’s total phenol imports originated from the subject countries presently under investigation in the recently initiated anti-dumping investigation concerning phenol.

However, as reflected in Figure 2, the share of imports from the subject countries during the proposed injury period remained lower than the historical import dependence levels prevailing prior to 2020-21. The share of subject countries in India’s total

phenol imports stood at 76% in 2022-23 and 84% in 2023-24, as against 92% and 93% during 2018-19 and 2019-20 respectively. The subsequent increase to 92% in 2024-25 merely reflects an alignment with India’s historical sourcing pattern for phenol imports, thereby raising serious questions regarding the alleged injury claimed by the domestic industry.

3.0 Major Global Destination Markets for Phenol Exports from Subject Countries

As reflected in Figure 3, the destination markets for phenol exports from the subject countries during the proposed injury period remained broadly diversified across several major international markets rather than being concentrated towards a limited number of countries. China accounted for the largest share of phenol exports from the subject countries at 31%, followed by India at 21%.

Further, substantial export volumes were also directed towards markets such as the Netherlands, Taiwan, Canada and several other countries. The above export distribution pattern indicates that phenol exports from the subject countries continue to remain globally diversified and are not disproportionately concentrated towards the Indian market, signalling that exports from the subject countries are not specifically directed towards India alone.

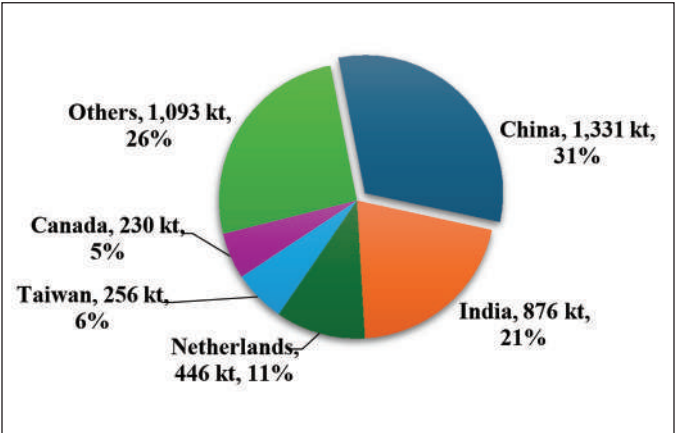


Figure 3: Major Destination Markets for Phenol Exports from Subject Countries During the Proposed Injury Period.

Annexure 2

Export Pricing Trends of Phenol from Subject Countries Across Major International Markets

1.0 International Comparison of Phenol Export Prices

When phenol exports from the subject countries are substantially diversified across multiple international destination markets, it becomes important to examine the comparative export prices at which phenol has been supplied by these countries to major importing markets. Such an examination provides important context regarding whether export prices to India materially differ from prices prevailing in other comparable international markets during the proposed injury period, ultimately signalling whether alleged dumping actually happened or not.

1.1 Korea RP

Table 3: Export Unit Prices of Phenol from Korea RP to Major Importing Markets (in US\$/Ton).

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,322	1,014	999	838	91,892
Thailand	2,587	3,000	999	829	24,372
Japan	1,281	1,057	1,138	901	16,925
India	1,289	926	893	757	13,103
China	1,278	999	1,017	795	10,252
Taipei, Chinese	1,345	956	996	780	9,817
Indonesia	1,772	1,134	1,077	871	5,534
Australia	1,272	1,025	1,057	857	4,105
Vietnam	1,601	1,167	1,164	984	3,381

As reflected in Table 3, export unit prices at which phenol was supplied from Korea RP to India during the proposed injury period remained relatively lower than certain major importing markets during 2023, 2024 and 2025. However, the extent of such variation was not unusually disproportionate when viewed against the broader range of export prices prevailing across major international destination markets during the proposed injury period.

At the same time, this trend was not uniformly observed throughout the proposed injury period, as during 2022, the export unit price of phenol exports from Korea RP to India stood at US\$ 1,289 per ton, which was higher than the corresponding export prices to countries such as Japan (US\$ 1,281 per ton), China (US\$ 1,278 per ton) and Australia (US\$ 1,272 per ton).

1.2 Saudi Arabia

Table 4: Export Unit Prices of Phenol from Saudi Arabia to Major Importing Markets (in US\$/Ton).

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,534	946	984	843	2,02,588
China	1,878	980	1,009	894	1,15,654
Belgium	1,370	1,265	1,304	1,005	28,062
India	1,140	799	452	349	19,798
Türkiye	-	892	-	1,025	16,502
United Arab Emirates	173	181	232	346	10,089
Taipei, Chinese	1,291	-	-	932	9,548
Netherlands	1,302	1,012	1,028	1,044	2,916

As indicated in Table 4, export unit prices of phenol from Saudi Arabia to major international destination markets exhibited substantial variation during the proposed injury period. While export unit prices to India remained comparatively lower than the prices prevailing in markets such as China, Belgium and the Netherlands, extremely lower prices were also observed in certain other destination markets such as the United Arab Emirates.

1.3 Singapore

Table 5: Export Unit Prices of Phenol from Singapore to Major Importing Markets (in US\$/Ton)

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,395	988	986	840	1,41,196
India	1,448	899	967	787	55,117
Thailand	1,317	964	979	871	36,886
China	1,367	938	922	869	20,548
Malaysia	1,481	1,218	1,100	880	17,505
Indonesia	1,459	1,084	991	868	8,713
Australia	1,303	1,046	1,361	930	2,426

During 2022, the export unit price of phenol from Singapore to India stood at US\$ 1,448 per ton, which was higher than the corresponding world average export price of US\$ 1,395 per ton. Further, during 2023, 2024 and 2025, export unit prices to India remained broadly aligned with the range of prices at which phenol was exported by Singapore to other major importing markets, without any abnormally sharp decline specifically in relation to the Indian market.

1.4 South Africa

Table 6: Export Unit Prices of Phenol from South Africa to Major Importing Markets (in US\$/Ton)

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,255	895	906	802	24,044
India	1,247	876	892	789	19,932
Brazil	1,187	917	935	820	1,344
New Zealand	1,237	929	928	889	687

Samoa	1,263	910	900	856	554
Gabon	1,575	1,284	-	799	548
Malaysia	1,325	1,050	1,038	934	519

Table 6 demonstrates that export unit prices of phenol from South Africa to India remained broadly aligned with the corresponding world average export prices during the proposed injury period. Export unit prices to India stood at US\$ 1,247 per ton in 2022, US\$ 876 per ton in 2023, US\$ 892 per ton in 2024 and US\$ 789 per ton in 2025, as against the corresponding world average export prices of US\$ 1,255 per ton, US\$ 895 per ton, US\$ 906 per ton and US\$ 802 per ton respectively.

1.5 Taiwan

Table 7: Export Unit Prices of Phenol from Taiwan to Major Importing Markets (in US\$/Ton).

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,225	867	859	758	91,644
India	1,374	998	-	733	43,955
China	1,175	847	844	743	36,245
Philippines	1,332	1,026	1,061	887	4,000
Türkiye	-	-	-	741	2,700
Malaysia	1,720	1,091	1,056	956	2,014
Vietnam	1,585	1,318	1,239	975	1,216

During 2022 and 2023, Taiwan exported phenol to India at unit prices of US\$ 1,374 per ton and US\$ 998 per ton respectively. These were higher than the corresponding world average export prices of US\$ 1,225 per ton and US\$ 867 per ton, indicating that phenol exports from Taiwan to India were undertaken at prices higher than the average prices prevailing across major international destination markets during the proposed injury period. Further, during 2025, export unit prices to India remained broadly aligned with the prices at which Taiwan exported phenol to other major importing countries such as China and Türkiye, without indicating any India-specific abnormal export pricing pattern.

1.6 Thailand

Table 8: Export Unit Prices of Phenol from Thailand to Major Importing Markets (in US\$/Ton).

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,249	896	915	800	2,33,361
India	1,348	916	921	818	1,15,666
Taipei, Chinese	1,288	905	910	765	43,182
Korea, Republic of	1,278	869	872	742	41,957
China	1,140	865	958	819	15,812
Indonesia	1,340	995	981	876	9,015
Vietnam	1,464	1,101	1,022	938	3,948
Australia	-	-	-	807	1,934
Lao People's Democratic Republic	-	-	951	949	1,449

During the proposed injury period, export unit prices of phenol from Thailand to India consistently remained higher than the corresponding world average export prices. Export unit prices to India stood at US\$ 1,348 per ton in 2022, US\$ 916 per ton in 2023, US\$ 921 per ton in 2024 and US\$ 818 per ton in 2025, as against the corresponding world average export prices of US\$ 1,249 per ton, US\$ 896 per ton, US\$ 915 per ton and US\$ 800 per ton respectively.

Further, export unit prices to India also remained higher than export prices prevailing in several other major importing markets such as Korea, Republic of; China; and Taipei, Chinese during multiple years of the proposed injury period, indicating that phenol exports from Thailand to India were not undertaken at unusually suppressed prices.

1.7 United States of America

Table 9: Export Unit Prices of Phenol from United States of America to Major Importing Markets (in US\$/Ton).

Importing Country	Export Unit Price (in US\$/Ton)				Exported Quantity (in tons), 2025
	2022	2023	2024	2025	
World	1,367	1,277	1,200	1,102	1,19,807
Canada	1,555	1,528	1,424	1,171	51,069
Netherlands	1,274	1,467	1,279	1,149	29,783
Mexico	1,506	1,351	1,431	1,084	14,846
Türkiye	985	836	876	833	7,856
Chile	1,080	1,047	1,110	864	5,878
India	1,238	772	890	854	5,600
Colombia	1,358	1,060	1,142	1,098	4,210

As indicated in Table 9, export unit prices of phenol from the United States of America to India during the proposed injury period remained higher than export prices prevailing in certain other major destination markets such as Türkiye and Chile during multiple years of the proposed injury period.

During 2022, export unit prices to India stood at US\$ 1,238 per ton, which was higher than the corresponding export prices to both Türkiye and Chile. Export unit prices to India also remained higher than export prices to Türkiye during 2024 and 2025, indicating that phenol exports from the United States of America were not undertaken at unusually suppressed prices specifically targeting the Indian market.

2.0 International Anti-Dumping Measures on Phenol Imports from Subject Countries

Table 10: Currently Active Anti-Dumping Measures on Phenol Imports from Subject Countries.

Importing Country	Exporting Countries Subject to ADD	Measures in Force Since
China	Korea RP, Thailand, United States of America	3rd September 2019

Table 11: Discontinued Anti-Dumping Measures on Phenol Imports from Subject Countries (Post-2020).

Importing Country	Exporting Countries Subject to ADD	Period of Measure
Brazil	United States of America	From 16th October 2002 to 16th September 2022
India	Singapore	From 8th March 2016 to 30th July 2021
India	Korea RP	From 8th March 2016 to 7th March 2021
India	South Africa	From 24th March 2003 to 9th January 2021

A review of anti-dumping measures adopted by importing countries on phenol imports from the proposed subject countries provides useful international context in relation to the present investigation. As indicated in Table 10, among the major importing countries of phenol from the subject countries, only China presently maintains anti-dumping measures in force against imports originating from Korea RP, Thailand and the United States of America.

Further, as reflected in Table 11, historically, India is the only major importing nation which had imposed anti-dumping duty measures on phenol imports from many of these subject countries. Furthermore, as highlighted through the international export pricing analysis discussed above, there were multiple instances where phenol exports from the subject countries were supplied to other international markets at prices comparable to or lower than export prices to India, despite which anti- dumping measures have generally not remained in force across major importing countries. This reflects the broader international approach of permitting continued access to competitively priced phenol imports in view of phenol’s importance as a critical industrial input for several downstream manufacturing sectors.□

Exploring Global Business Opportunities & International Trade: FIPPI Invites Members to Business Delegations to Chile



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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Chief Patron Mr. Sajjan Bhajanka	Patrons Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	President Mr. Rajesh Mittal	Senior Vice President Mr. Jaydeep Chitlangia	Vice Presidents Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Director General Dr. M.P. Singh
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FIPPI/225-Chile-2026

June 30, 2026

Dear Members,

Subject: Invitation for Nominations – FIPPI Business Delegation to Chile & Expo Corma 2026.

Dear Sir,

The Federation of Indian Plywood & Panel Industry (FIPPI) is pleased to inform you that, following discussions with the Embassy of Chile in New Delhi, an opportunity has emerged to organize a business delegation to Chile for exploring trade, technology, and raw material sourcing opportunities for the Indian plywood and wood panel industry.

Chile is a globally recognized producer of sustainably managed timber, particularly radiata pine and eucalyptus, widely used in plywood, veneers, and engineered wood applications. Chilean exporters offer consistent quality, long-core logs suitable for veneer production, and certified products aligned with international environmental and emission standards. With increasing demand in India for high-performance products such as BWP, marine, and fire-rated plywood, Chilean wood could serve as a stable and competitive input, supporting both quality enhancement and long-term supply reliability across the industry.

The Embassy of Chile has expressed its willingness to organize a tailored program for the delegation, including visits to relevant manufacturing facilities, meetings with Chilean exporters, and interactions with public and private sector stakeholders. The programme will provide participants with valuable insights into Chile's forestry ecosystem, sustainable forest management practices, advanced wood processing technologies, and potential business and sourcing opportunities.

The proposed visit is expected to be aligned with ExpoCorma 2026, one of the leading international forestry, wood, and timber industry exhibition in Chile, scheduled from 18 - 20 November 2026, organized by CORMA (Chilean Wood Corporation). The event brings together key stakeholders across the value chain, including timber producers, machinery suppliers, panel manufacturers, technology providers, and exporters. The exhibition offers a platform to:

- Explore the latest innovations in forestry and wood processing
- Engage directly with Chilean and international suppliers
- Visit industrial sites and field demonstrations
- Network with industry leaders and public sector representatives

To facilitate planning of the delegation programme, the Embassy of Chile has requested details regarding the likely composition of the delegation, including the number of participants, company profiles, and areas of interest. As a general approach, while the Embassy of Chile and ProChile will actively support the coordination of agendas, meetings, and local logistics, international travel and accommodation will be typically arranged by the participating delegates.

This would provide an excellent opportunity to engage directly with key stakeholders across the forestry and wood products value chain, including timber producers, veneer and plywood manufacturers, exporters, and relevant government agencies.

In this regard, interested members are requested to submit their nominations to facilitate coordination with the Embassy of Chile.

With regards,

Dr. M.P. Singh
Director General, Federation of Indian Plywood and Panel Industry (FIPPI)

Exploring Global Business Opportunities & International Trade: FIPPI Invites Members to Business Delegations to New Zealand



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FIPPI/225-NZ-2026

June 30, 2026

Invitation for Nominations – FIPPI Business Delegation to New Zealand

Dear Members,

The Federation of Indian Plywood & Panel Industry (FIPPI) is pleased to inform you that, as part of its ongoing efforts to strengthen international collaboration and facilitate new business opportunities for the Indian plywood and woodbased panel industry, FIPPI is proposing a Business Delegation to New Zealand to better understand New Zealand’s forestry and timber sector.

The initiative follows the discussions held by the FIPPI delegation at the New Zealand High Commission on 17 November 2025 with representatives of the New Zealand forestry and timber sector. Subsequently, FIPPI had further discussions with the New Zealand Timber Industry Federation (NZTIF) to explore opportunities for a structured industry visit aimed at strengthening bilateral cooperation and expanding trade between India and New Zealand.

We are pleased to share that the New Zealand Timber Industry Federation has welcomed the opportunity and expressed its willingness to coordinate a comprehensive industry programme for the Indian delegation. The proposed programme is expected to include:

- A visit to the forests
- A visit to a sawmill facility showing a range of products
- A visit to a plywood manufacturing operation
- Visits to buildings demonstrating the end use of New Zealand timber products
- Meetings with relevant government agencies

The visit has been tentatively proposed for late October or early November, coinciding with New Zealand’s spring season, with a duration of approximately 4–5 days.

The delegation will provide an excellent opportunity for participants to:

- Gain first-hand exposure to New Zealand’s forestry management practices and sustainable timber value chain.
- Understand the country’s timber processing and plywood manufacturing capabilities.
- Interact with industry leaders, exporters, and government agencies.
- Explore opportunities for sourcing logs, veneers, timber, and other wood products.
- Develop new business partnerships and strengthen trade relations between India and New Zealand.

Members who are interested in joining the proposed delegation are requested to kindly send their nominations.

We look forward to your participation.

With warm regards,

Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)

Applicability of New Labour Codes to Agroforestry Tree-based Production Systems



R C Dhiman*

Introduction

Agroforestry as a sustainable land use production system is multi-dimensional, multi-functional, multi-sectoral, multi-stakeholder based and multi-utilitarian. It is practiced predominantly on agriculture land where trees are integrated with agricultural crops. The deliberate and systematic integration of commercial trees on agricultural fields for wood production was started around 5 decades back and is now mature enough to support over 92% of the total wood supplies in the country. Commercial tree plantations grown in agroforestry are the main driver of agroforestry expansion at least around those locations where wood production and supply chains have extensively developed to support wood production. Some of the highly adaptive and productive agroforestry systems and models are now practiced in the top fertile and productive regions like north-western Indo-genetic plains region which is often called as the food-bowl of India. Growing trees with and without crops, even in this region and many others, is immensely helping farmers in doubling their income from the sale of tree produce. The major share of this agroforestry production ecosystem is in unorganized sector where the understanding and knowledge of different regulations related to labour laws are very poor.

Of late, the Government of India has been reviewing the regulatory and compliance ecosystem in various sectors and simplifying them with an objective to facilitate ease of doing business and to reduce reporting and compliance burden of employers in the fast evolving digital ecosystem. In a similar attempt, centre government has now reviewed the 29 existing labour related laws and amalgamated them into four codes. These new labour codes have been recently introduced in the country and this paper discusses in details their applicability to agroforestry grown plantations and nurseries. For the purpose of this paper, 2 types of agroforestry tree-based production systems are mentioned which includes agroforestry tree-based plantations and nursery production systems grown on agriculture land. In addition, the applicability of these codes is wide spread, across the country, in different occupations, businesses, wood based industry, other industrial & commercial establishments etc. which employ causal, regular and contractual workforce for paid works. The details of these codes is predominantly discussed in reference to the agroforestry production systems, for their relevance to other occupations and businesses, readers are referred to consult details in the respective codes.



T D Khurana**

New Labour Codes

Recently government of India has consolidated and rationalized 29 labour acts into 4 labour codes with an objective to simplify and reduce the compliance burden

and announced their implementation from 21st Nov, 2025. The 4 labour codes are now named as The Code of Wage Act, 2019; The Industrial Relations Code, 2020; The Code on Social Security, 2020; and The Occupational Safety, Health and Working Conditions Code 2020. The list of labour laws now amalgamated into these 4 labour codes is given in Table-1.

*Advisor-Sustainable Agroforestry Initiatives, Greenlam Industries Ltd. (Ex-Unit Head, Wimco Seedlings ITC-PSPD).

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Table-1: Old 29 acts amalgamated into 4 labour codes.	
The Codes of Wages Act, 2019	
The Payment of Wages Act, 1936	The Minimum Wages Act, 1948
The Payment of Bonus Act, 1965	The Equal Remuneration Act, 1976
The Industrial Relation Act, 2020	
The Trade Unions Act, 1926	The Industrial Employment (Standing Orders) Act, 1946
The Industrial Disputes Act, 1947	
The Code on Social Security, 2020	
The Employees' Compensation Act, 1923	The Employees' State Insurance Act, 1948
The Employees' Provident Funds and Miscellaneous Provisions Act, 1952	The Employment Exchanges (Compulsory Notification of Vacancies) Act, 1959
The Maternity Benefit Act, 1961	The Payment of Gratuity Act, 1972
The Cine-Workers Welfare Fund Act, 1981	The Building and Other Construction Workers Welfare Cess Act, 1996
The Unorganized Workers' Social Security Act, 2008	
The Occupational Safety, Health & Working Conditions Code 2020	
The Factories Act, 1948	The Contract Labour Act, 1970
The Mine Act, 1952	The Dock Workers Act, 1986
The Building & Other Construction Workers Act, 1996	The Plantation Labour Act, 1951
The Inter-state Migrant Workmen Act, 1979	The Working Journalist and other News Paper Employees Act, 1955
The Working Journalist (fixation of rate of wages) Act, 1958	The Cine Workers and Cinema Theatre Workers Act, 1981
The Motor Transport Workers Act, 1961	The Sales Promotion Employees Act, 1976
The Beedi and Cigar Workers Act, 1966	

There are significant changes in the new codes which include making it as “One Nation-One Code” on wages. The new codes replace the confusing legacy system where different acts defined wages differently and now introduced a universal and standardized definition of “wages” that applies consistently across all four labour codes. The language of the “employee” definition is also the same across all the four new labour codes. In these codes, the term Inspector is replaced with “Inspector-cum-Facilitator” emphasizing a dual role that combines enforcement with guidance. It also introduced a “Single Unified Annual Electronic Return” to reduce the administrative load of multiple returns and “Contractor has been classified as Employer”. The definition of the Employer in new code is given as under:

“A person who employs, whether directly or through any person, or on his behalf or on behalf of any person, one or more employees in his establishment and where the establishment is carried on by any department of the central government or the state government, the authority specified, by the head of such department, in this behalf or where no authority, is so specified the head of the department and in relation to an establishment carried on by a local authority,

the chief executive of that authority, and includes,— (i) in relation to an establishment which is a factory, the occupier of the factory as defined in clause (n) of Section 2 of the Factories Act, 1948 (63 of 1948) and, where a person has been named as a manager of the factory under clause (f) of Sub-section (1) of Section 7 of the said act, the person so named; (ii) in relation to any other establishment, the person who, or the authority which, has ultimate control over the affairs of the establishment and where the said affair is entrusted to a manager or managing director, such manager or managing director; (iii) contractor; and (iv) legal representative of a deceased employer”. Applicability potential of the new labour codes to the agroforestry tree-based production systems is discussed code-wise below.

The Code of Wage Act, 2019

The provisions of this code are universally applicable to all sectors, including agroforestry tree-based production systems, which employ labour for paid works. This code establishes the statutory rights to the minimum wages and prohibits any employer from paying wages less than the minimum rate notified by the respective appropriate government. Minimum wage is applicable to all workers

regardless of the establishment whether they are in the organized or unorganized sectors. The rule applies strictly to everyone and the establishments cannot bypass this obligation by classifying workers into different categories.

The definition of the establishment is given in Section 2(m) which explicitly includes any place where an "occupation" or "business" is carried out. Both the agroforestry tree-based plantation and nursery activities are well covered under the preview of establishment as per the provisions of this code.

Section 5 ensures that every agricultural worker is legally entitled to minimum wage, eliminating the old system of restricted "Scheduled Employments". Both the agroforestry plantations and nurseries are considered agriculture activities and income from them as agricultural income and are required to be governed under the provisions of this code. The minimum wage for agricultural sector is notified periodically by the respective state and central governments as prescribed under Section 6 of the Code of Wage Act 2019.

Section 54(4) exempts employers which employ 5 or fewer persons for agriculture activities including agroforestry tree-based plantation and nursery production systems and domestic purpose from the rigorous administrative requirements of maintaining formal wage registers and issuing printed wage slips, whereas, it is strictly applicable to occupations and businesses including agroforestry tree-based production systems which employ over 5 persons on any single day of the year.

Section 50 (1) to (3) prescribes procedure for records, returns and notices and includes (1) Every employer of an establishment shall maintain a register containing the details with regard to persons employed, muster roll, wages and such other details in such manner as may be prescribed. (2) Every employer shall display a notice on the notice board at a prominent place of the establishment containing the abstract of this code, category-wise wage rates of employees, wage period, day or date and time of payment of wages, and the name and address of the Inspector-cum-Facilitator having jurisdiction. (3) Every employer shall issue wage slips to the employees in such form and manner as may be prescribed. However, the growers of agroforestry tree-based plantations and nurseries who employ 5 or fewer persons for agricultural and domestic purpose are exempted from these requirements

The central government sets a statutory national floor wage, considering minimum living standards (Section 9). No state is legally permitted to set a minimum wage below the national floor wage, but states can set wages higher based on local economic conditions and the cost of living.

As per Section 2(y), "wages" are defined as: Basic Pay + Dearness Allowance (DA) + Retaining Allowance. The new law says that these wages must be at least 50% of total wages. All other components like HRA, travel allowance, special allowance, overtime allowance, etc. cannot together exceed 50% of total wage. In case the allowances exceed

50% of all remuneration, the excess over 50 % shall be added back to wages. However, the rule of adding back allowances to wages is not applicable for the purpose of gratuity, ESI and retrenchment compensation calculations. Performance based incentives, Employee Stock Option Plans (ESOPs), variable part of the component or reimbursement-based payments to the employees shall not be part of the wages for this purpose.

Employers must not discriminate on the basis of gender in paying wages for the same or similar work, and must not discriminate on the basis of sex while recruiting employees (Section 3). Section 6 mandates that the appropriate government must fix the minimum wage. For employees paid on a piece-rate basis, the government must guarantee that their earnings cannot fall below the minimum time-rate basis. Every establishment shall fix wage periods, which may be daily, weekly, fortnightly, or monthly. Section 12 prevents wage manipulations, exploitation and unfair practice in piece rate jobs.

Section 17 mandates strict timeline for payment of wages. All wages must be paid within the prescribed timelines namely at the end of day for daily payment; on the last working day of week for weekly payment; before the end of the second day after the end of the fortnight for fortnight payment; and before the expiry of the seventh day of the succeeding month for monthly payment. The employer is required to pay all due wages within two working days if an employee leaves an establishment; whether by resignation, dismissal or termination.

Section 14 regulates the payment of overtime wages. If a worker including employee, whose minimum rate of wages has been fixed for the works beyond normal working hours, the employer must pay overtime for each extra hour at the rate of at least twice the normal wage. Section 19 governs the imposition of fines on employees. It establishes that employers can only fine workers for specific acts or omissions previously approved by the government, and the total fine cannot exceed 3% of the employee's wages in a given pay period. Section 21 (2) directs that no fine shall be imposed on any employee until he/she has been given an opportunity of showing cause against the fine or otherwise than in accordance with such procedure as may be prescribed for the imposition of fines.

Section 26 governs the eligibility and calculation rules for the annual minimum bonus paid to employees. Employees earning up to a specific monthly wage threshold (notified by the appropriate government) and work at least 30 days in an accounting year are eligible for bonus. Under the older repealed Payment of Bonus Act, 1965; the statutory threshold was explicitly fixed at Rs 21,000 per month. Until individual states formally notify a new limit under this code, Rs 21,000 is the baseline. The annual bonus is paid minimum at the rate of 8.33% and maximum up to 20% of the wages earned by the employee.

Section 43 holds the employer directly accountable for

payment of wages. For any offences under this code, Section 54, mentions the following penalties. For first time offences, the fine depends on the specific violation, for underpayment attracts a maximum fine of Rs 50,000; while general contraventions carry a fine of up to Rs 20,000. No offence of same nature shall be compounded, if it has been repeated within a period of 5 years. If again found guilty for the same offence- for underpayment attracts a maximum fine of Rs 1,00,000, or imprisonment up to 3 months, or both; while general contraventions carry a fine of up to Rs 40,000, or imprisonment up to 1 month, or both. According to Section 56, the offence can be compounded (settled) before or after legal proceedings start by paying a sum equal to 50% of the maximum fine provided for that offence.

Industrial Relations Code, 2020

Unlike Code on Wage Act 2019, the Industrial Relation Code 2020 is applicable to the only industrial establishments. The definition of industrial establishment provided in the act is as under:

Industrial establishment or undertaking” means an establishment or undertaking in which any industry is carried on. Further, the act specifically includes plantation in the definition of industrial establishments for the purpose of chapter IX and chapter X of the act. These chapters also suggest that the definition of plantation as defined in clause (f) of Section 2 of the Plantations Labour Act, 1951 will be applicable for this purpose. Under Clause (f) of Section 2 of the Plantations Labour Act, 1951, a “Plantation” is defined as any land used for growing tea, coffee, rubber, cinchona, or any other plant that the state government notifies.

By including “Plantations” in the definition of establishment specifically for chapter IX and X of the act, the parliament intentionally and purposefully left out the agriculture (other than the plantations) out of the purview of establishment definition. It is evident that the agriculture activity is not covered in the definition of the Industrial establishment or undertaking, otherwise the lawmakers would have had no reason to explicitly include “plantation” into the chapters IX and X of the act. The chapter IX and X of the act will apply to the plantation workers, that too, if the state government, by notification, so directs. However, as on date no state government has notified agroforestry tree plantations for this purpose.

Based on the above discussion, it is the considered opinion of the authors that the intention of the lawmakers is to exclude the agriculture from the definition of establishment given in the Industrial Relation code 2020 and the act does not generally apply to agricultural activities including agroforestry tree-based plantations and nurseries.

The Code on Social Security, 2020

Tree-based agriculture growers which employs less than 10 persons (in case of EPF, 20 or more), in the production and sale of goods and services related therewith, are covered under the unorganized sector as per Section 2(85) of the

code and as such does not have any social security liability on plantation and nursery growers. In case the employed persons are 10 or more, the following provisions are applicable.

The monthly wage ceiling for mandatory Employees’ State Insurance (ESIC) coverage is Rs 21,000 but for persons with disabilities, the limit is Rs 25,000. ESIC coverage & benefits are extended across-India, voluntarily for establishments with fewer than 10 employees (including workers). It is settled position that all workers are employees but all employees are not workers. This act talks about employee and persons instead of workers, and is mandatory for establishments with 10 or more employees. Under old law, ESIC coverage was limited to notified areas, whereas, these provisions are now extended across India.

The ESIC provisions are not applicable to seasonal establishments. However, in case of establishments engaged in hazardous or life-threatening activities, the provisions will apply even if one person is employed. As per Section 32, different types of periodical or one-time benefits to which an insured worker or his/her dependents are entitled are given in the following Table-2.

Table-2: Insured workers and their dependants entitled for different benefits.	
Benefit	Remarks
Sickness	Insured workers
Maternity	Women workers
Disablement	Disablement caused during employment
Dependent	Worker died during employment
Medical	Insured workers and their dependents
Funeral	Persons who conducts funeral

As per Section 53, gratuity must be paid to an employee on termination of his employment after completing of at least 5 years of continuous service. An employer shall pay gratuity to a fixed term employee on termination of their contract period after completion of one year service. Fixed Term Employment covers employees directly engaged by the employer. As per Section 56, the employer shall pay the amount of gratuity within 30 days from the date it becomes payable. A woman employee is eligible for maternity benefits if she has worked for at least 80 days in the preceding 12 months.

In case the establishment is covered by ESIC, maternity cash benefits are governed and paid directly by the ESIC rather than by the employer. If a female employee earns more than the ESIC ceiling, she remains entitled to the full 26 weeks of paid maternity benefits directly from her employer under the social security code. Section 68 protects against termination of a woman employee who absents herself from work in accordance with law on account of maternity leave. Section 64 mandates employers to pay a medical bonus of Rs. 3,500 to every woman employee entitled to maternity benefit. As per Section 65, woman employees are entitled

to 6 weeks of maternity benefits in case of miscarriage or medical termination of pregnancy. Section 66 provides two nursing breaks, in addition to regular rest intervals allowed to every woman employee who has returned to work after delivery, until the child attains 15 months of age.

As per Section 74, every employer must pay compensation if an employee suffers injury or death due to an accident arising out of and in the course of his employment. An accident occurring to an employee while travelling between place of residence and workplace and vice-versa will be treated as having arisen out of and in the course of his employment.

EPF regulations are applicable for those establishments who employ over 20 persons on any single day of the year. The EPF under old provisions were limited to “scheduled employments” which have now been removed. As per Section 16, the employer must contribute 10% of the employee’s wages towards EPF scheme. The EPF contribution must be equal to the employer’s contribution. If an employee opts to contribute more than 10% of wages, the employer is not required to contribute beyond its prescribed share.

Provident Fund contributions (both employer and employee) continue to be restricted to the statutory wage ceiling of Rs. 15,000 per month under the existing Employees’ Provident Fund Scheme, 1952. There is no change in the quantum of Provident Fund contributions or take-home pay, notwithstanding the expanded definition of “wages” under the new labour codes. Any contribution on wages exceeding the statutory ceilings remains voluntary and cannot be mandated. Accordingly, there is no immediate impact on Provident Fund contribution for employees drawing basic salary above Rs. 15,000 per month under the current Provident Fund framework.

Section 6(2) mentions the establishment of the “National Social Security Board” to recommend welfare schemes for unorganized, gig, and platform workers. Section 6(9) mentions the creation of the “State Unorganized Workers’ Social Security Board” to look after the state-level scheme recommendations. Section 45 empowers the central government to frame schemes allowing unorganized, gig, and platform workers to receive medical/sickness benefits from the Employees’ State Insurance Corporation (ESIC). Section 109 mandates the central and state governments to frame welfare schemes covering life insurance, disability cover, health benefits, maternity benefits, and old age protection.

The Occupational Safety, Health and Working Conditions Code 2020

The definition of establishment is crucial for application of this code to any occupation or business. As per Section 2(v) of the Occupational Safety, Health and Working Conditions Code, 2020; the term “Establishment” means: (i) a place where any industry, trade, business, manufacturing or occupation is carried on in which 10 or more workers are

employed; or (ii) motor transport undertaking, newspaper establishment, audio-video production, building and other construction work or plantation, in which 10 or more workers are employed; or (iii) factory, for the purpose of Chapter II, in which 10 or more workers are employed, notwithstanding the threshold of workers provided in clause (w); or (iv) a mine or port or vicinity of port where dock work is carried out.

As per Section 2 (zx) “plantation” means— (a) any land used or intended to be used for— (i) growing tea, coffee, rubber, cinchona or cardamom which admeasures 5 hectares or more; (ii) growing any other plant, which admeasures 5 hectares or more and in which 10 or more persons are employed or were employed on any day of the preceding 12 months, if, after obtaining the approval of the central government, the state government, by notification, so directs.

The above definition indicates that a distinct and separate category for “plantations” was created intentionally and purposefully which left out the agriculture (other than the plantations) out of the purview of establishment definition in the Occupational Safety, Health and Working Conditions Code 2020. Agriculture activity is not covered under the “occupation” or “business” umbrella of sub-clause (i). The Occupational Safety, Health and Working Conditions Code, 2020 will apply to the plantation workers, that too, if, after obtaining the approval of the central government, the state government notifies the same. As on date, no state government has reportedly notified agroforestry tree plantations for this purpose

Agroforestry tree-based plantations and nurseries use large number of insecticides, pesticides, chemical fertilizers and some others; some of the provisions of social security code could be applicable to them if the state government so notifies. Section 93 of the code prescribes that the state governments after obtaining approval of central government needs to notify the provisions for the safety of workers against use, handling, storage and transport of insecticides, pesticides, chemicals and toxic substances. Employers are also required to put up the government precautionary notices in the premises about these substances, train workers on their use and handling, conduct medical check-up and maintain their health record; and appoint a qualified person for supervision of these substances etc.

Discussion

Agroforestry based production systems including plantations and major share of nurseries are located on agriculture land, they are treated as agricultural activities and inherit traditional agricultural exemptions under the Income tax Act. However they often employ seasonal and regular paid workers for different activities which are covered under specific provisions of these labour codes, as such, their exposure may depend on operational boundaries and threshold limits provided under these codes. Table-3 indicates the threshold limits of employed workers for different occupations and businesses under different codes which vary between 1 to many workers depending upon

specific clauses and activities mentioned in these codes. These thresholds are applicable for only the purpose of the provisions of these four labour codes independent of other acts and regulations applicable to establishments.

Table-3: Threshold limits for workers and area under different codes and their applicability to agroforestry tree-based production systems.		
Code	Threshold limits	Compliances
The Code on Wage Act 2019	Establishment with more than 5 persons for agriculture or domestic purpose	- Requirements of maintaining formal wage, attendance and overtime registers and issuing regular wage slips to its workers. - Display on the notice board at a prominent place of the establishment containing the abstract of the code, category-wise wage rates of employees, wage period, day or date and time of payment of wages, and the name and address of the Inspector-cum-Facilitator having jurisdiction.
	Establishment with 1 or more persons.	- Payment of minimum wages. This rule applies strictly to everyone. - Basic Pay + Dearness Allowance (DA) + Retaining Allowance must be at least 50% of total wages. - No gender based discrimination or manipulations, exploitation and unfair practice in piece rate jobs. - Cap (3%) on fine deduction from wages. - Wages must be paid within the prescribed timelines - If worker works beyond normal working hours, the employer must pay overtime for each extra hour at a rate of at least twice the normal wage
	20 or more persons	Payment of bonus
Code on Social Security, 2020	Every establishment with 20 or more employees	Provisions of Employee's Provident Fund are applicable.
	Every establishment 10 or more persons employed other than seasonal factory	ESI Coverage related compliances are applicable. For establishment engaged in hazardous or life-threatening activities, even if one person is employed.
	Every shop or establishment with 10 or more employees	Gratuity & Maternity benefits related compliances are applicable.
Industrial Relation code 2020	Applicable to only industrial establishments	May not be generally applied to agricultural activity including nurseries and agroforestry tree-based plantations. However, the chapter IX and X of the act will apply to the plantation workers, that too, if the state government notifies so.
OSH and Working Conditions Code 2020	Establishments employing 10 or more persons	May not be generally applied to agricultural activities including nurseries and agroforestry tree-based plantations. However, it will apply to the plantation workers, after the notification of the state government.

Table-4 mentions different kinds of fines and penalties on contravention of the provisions of different codes for different activities which may vary from a normal fine of small amount to rigorous legal action depending upon the violations. However, a major relief for businesses and occupations is that the newly designated Inspector-cum-Facilitator cannot directly penalize or prosecute for a first-time clerical or operational non-compliance without first giving an explicit written warning and an opportunity to fix the issue. However, repeated violations on the part of employer of labour may lead to appropriate legally imposed fines and penalties.

Table-4: Fines and Penalties for violation of the provisions of the Labor Codes

Code	Violation	Fine (Rs) and Penalty	
		First time	Subsequent / Repeated Offense
Code on Wage Act 2019	Wage payment	Up to 50000	Rs 1 Lakh or 3 months imprisonment or both
	General violation	Up to 20000	Up to Rs 40000 or 1 month imprisonment or both
Code on Social Security 2020	Failure to pay EPF and ESI contribution	50000 to 1 Lakh and imprisonment 2 to 6 months	3 Lakh and Imprisonment between 2 to 3 years
	Violation on maternity benefits or gratuity	Up to 50000 or up to 1 year imprisonment or both	
	Failure to deposit employees share	1 Lakh and 1 to 3 year imprisonment	
	Obstructs any Inspector cum Facilitator or other officer	50000 to 1 Lakh and imprisonment 2 to 6 months	Imprisonment for a term which may extend to 2 years and with fine of 2 Lakh
	Entitled woman is not provided maternity benefit.		
	Fails to produce register or document demanded		
	Making false return, report, statement or information		
	Illegal wage deduction.		

The bulk of agroforestry tree-based plantations are in unorganized sector where millions of small and marginal farmers are growing them for producing wood to wood based industry. Farmers have a very small land holding as such the scale of plantations being grown by each grower is very small, though collectively it is extensive in pockets as over 92% of the wood demand of the country is now sourced from this resource. There is only a select window at planting and harvesting period when workers operating agricultural activities often exceed the threshold limits of workers prescribed and mentioned under different codes. There is a very large degree of overlapping deployment of labour from own family members, seasonally and casually hired and that from contractors in major operations like planting the saplings; and harvesting, logging, segregation, loading and transportation of wood. A large number of plantations are sold standing to contractors, as such; operations starting from felling onward are carried out by the purchasers of such plantations by contractor's own labour and costs. This may provide leverage to the growers to maintain the employed workers below the threshold limits to avoid negative exposures. However, it increases the liability of such contractors on labour regulations.

Tree-based nurseries on agriculture land may have higher exposure under the provisions of these codes as they more often need regular work force compared to agroforestry plantations. The scale of plant production in some nursery is very large where they are producing millions

of plants throughout the year. They often need technically better skilled workers though some nursery operations may be carried out by overlapping workers from own family, regularly hired and contract category.

Currently there is very low awareness among the plantation and nursery growers and labour class related to the labour laws. Both of these activities are currently generating handsome returns from the sale of wood and nursery grown plants. This paper may help the growers, entrepreneurs and labour class to get educated on the different provisions of these labour codes for application to occupation/business and accordingly may start implementing them to avoid negative exposures and penalties. The provisions of the labour codes discussed here are also equally applicable to other sectors including wood based industries and this may also help them to streamline their operations in consonance with the applicable provisions of these codes.

Agroforestry is totally in unorganized sector and it operates in areas where administrative and governance system is very weak, both growers and workers often lack awareness on labour regulations. For growers of plantations and nurseries, compliance builds a healthier, more productive workforce and reduces the legal and reputational risks associated with labour exploitation. As India transitions toward the new labour codes, plantation and nursery growers will need to remain informed about these and evolving regulations.□

Promoting Agroforestry-Based Industrial Growth in Jharkhand: FIPPI Requests for Inclusion of Plywood and Wood Panel Industry (MDF, Particle Board, and Flush Doors) Utilizing Agroforestry Timber under the Priority Sector



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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Chief Patron Mr. Sajjan Bhajanka	Patrons Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	President Mr. Rajesh Mittal	Senior Vice President Mr. Jaydeep Chitlangia	Vice Presidents Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Director General Dr. M.P. Singh
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FIPPI/POLICY-01/2026-27

25 May 2026

To,
The Secretary,
Department of Industries
Government of Jharkhand.

Subject: Inclusion of Plywood and Wood Panel Industry (MDF, Particle Board, and Flush Doors) Utilizing Agroforestry Timber under the Priority Sector.

Respected Sir,

The Federation of Indian Plywood and Panel Industry (FIPPI) writes as the unified voice of India’s plywood and panel industry, representing manufacturers and stakeholders across the country. The sector plays a significant role in employment generation, enhancing farmer incomes, and promoting most sustainable products.

The plywood and wood panel industry in India has witnessed steady growth, supported by rising demand and strong investment momentum. In recent years, production has grown by approximately 15%, increasing from around 10 million cubic meters to nearly 11.5 million cubic meters. The sector has attracted investments exceeding ₹3,000 crore, with several manufacturers undertaking capacity expansions. Currently, the industry is poised to operate at an estimated capacity of about 12 million cubic meters of plywood, along with approximately 4 million cubic meters each of MDF and particle board. Demand is projected to grow substantially, with overall consumption expected to double by 2030.

Despite this robust national growth trajectory, Jharkhand has not experienced comparable development in this sector. The current industrial policy does not explicitly recognize the plywood and panel industry. Moreover, sawmills and wood sawing activities are presently categorized under ineligible sectors for incentives, which has constrained industrial investment and limited the establishment and expansion of plywood and panel manufacturing units within the state.

It is pertinent to note that the Jharkhand Industrial and Investment Promotion Policy 2021 envisions promoting **“sustainable industrial growth of the State”** and emphasizes inclusive, employment-oriented industrialization aligned with optimal utilization of local resources.

In this context, the plywood and wood panel industry aligns closely with the State’s policy objectives. The sector is inherently sustainable due to its reliance on plantation-based raw materials. Agroforestry-driven production systems not only ensure sustainable sourcing but also diversify farm incomes, promote tree cultivation on agricultural land, and contribute to carbon sequestration. Over 90% of the industry’s timber requirements are sourced from Indian farmlands, directly linking industrial growth with farmer prosperity. The remaining requirement, particularly face veneer, is largely

met through imports, presenting a significant opportunity for import substitution through the promotion of long-rotation timber cultivation.

Recognizing these advantages, several progressive states have extended policy support to such industries. For instance, the Odisha Industrial Policy Resolution 2022 identifies industries utilizing agroforestry-produced raw materials as priority sectors eligible for incentives. Similarly, the Chhattisgarh Industrial Development

Policy 2024–30 classifies Enterprises based on wood obtained from Plantations as thrust sectors, emphasizing local value addition, employment generation, and targeted incentivization. Furthermore, Andhra Pradesh places this sector on an equal footing with other mainstream manufacturing industries, extending equivalent strategic importance and competitive fiscal incentives.

Jharkhand is well-positioned to promote agroforestry and timber-based industries. A variety of fast-growing species such as Acacia, clonal Eucalyptus, Silver Oak, Casuarina, Kadamb, Ailanthus, Semul, and Melia can achieve high productivity within 4–5 years, even under rainfed conditions. Additionally, long-rotation timber species can be cultivated along field bunds and farm peripheries, maturing over approximately 8–10 years, and can cater to high-value applications such as face veneer.

The state also possesses considerable untapped potential to support this sector. **Approximately 2.56 million hectares (32.1%) of land is classified as fallow**, indicating substantial scope for agroforestry expansion. Integrating this sector into the priority framework would enhance tree cover, promote industry-driven plantation practices, and create a stable and assured market for agroforestry timber, thereby improving farmers' incomes.

Agroforestry is already a traditional practice in Jharkhand and holds significant potential for improving rural livelihoods, restoring degraded lands, and mitigating climate change impacts. However, in the absence of strong industry linkages, farmer participation remains limited, reducing the incentive for large-scale plantation activities.

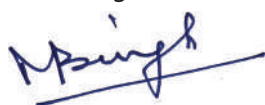
The growth of plywood and panel industries will further strengthen agroforestry ecosystems within their catchment areas. Industries can support farmers through access to high-quality planting material, technical guidance, and assured market linkages with remunerative pricing. Regions such as Santhal Pargana, including Giridih district, have strong potential to emerge as first agroforestry-based industrial clusters due to their resource base and geographic suitability.

In light of the above, it is humbly requested that plywood and wood panel industries utilizing plantation timber be formally designated under the Priority Sector. Furthermore, we request that the State implement enabling administrative frameworks to facilitate hassle-free establishment. Specifically, this could include replacing rigid licensing mandates with a streamlined, single-window registration process managed by a State Forest Department, paired with targeted establishment incentives. Such a measure would attract more plywood and panel industries and will align with the State's vision of sustainable and inclusive growth while catalyzing investment, generating rural employment, and enhancing farmers' incomes.

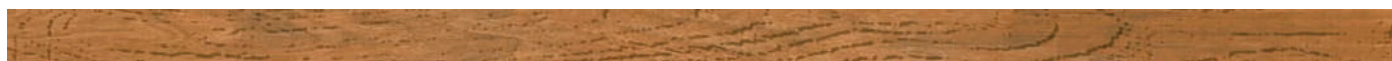
Additionally, extending appropriate fiscal and policy incentives under relevant schemes would further enhance the sector's attractiveness and accelerate investments in the state. Incentives promoting sustainability such as support for green technologies and cleaner production processes would also encourage environmentally responsible industrial development. Further, targeted incentives for farmers through direct benefit transfer mechanisms to promote farm forestry would strengthen the raw material base and ensure inclusive growth.

We look forward to your kind consideration and support in fostering a sustainable and growth-oriented industrial ecosystem in Jharkhand.

Warm Regards,



Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)



Supporting Continued Policy Stability for Quality Control Orders: FIPPI Highlights the Transformational Impact of QCOs on the Plywood and Panel Industry



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FIPPI/NITI/2026-27/01

June 3, 2026

To,
Shri Rajiv Gauba, IAS (Retd.)
Member, NITI Aayog, New Delhi – 110001.

Subject: Continued Policy Stability for Quality Control Orders (Plywood & Panel Products).

Respected Sir,

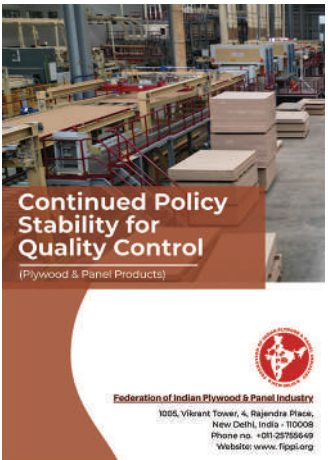
With reference to our earlier communication (Ref. No. FIPPI/Reforms2/2025-26 dated 29 December 2025), FIPPI respectfully submits an update on the key insights and QCO-driven transformations in the Indian plywood and panel sector through the following points:

- 1. End-Consumer and Carpenter-Driven Plywood and Panel Products:** Contrary to common misconception, plywood and panel products in India are predominantly purchased by end consumers. QCOs have directly boosted the confidence of carpenters, aligning with the objectives of the PM Vishwakarma Scheme.
- 2. Challenges Before QCOs:** Prior to the QCOs, consumers were often misled into purchasing inferior products as quality products, while carpenters faced rework and wasted time due to substandard panel products. Further, the absence of a mandatory quality framework discouraged unorganized players from entering the formal system. QCOs have strengthened consumer confidence in carpenters, thereby boosting their incomes and accelerating industry formalization (compliance rate: ~25% pre-QCOs to ~70% post-QCOs).
- 3. Transformation of the Plywood and Panel Industry Through QCOs:** QCOs have initiated a significant transformation of the sector through import substitution, industry formalization and investment attraction, while establishing a level playing field for compliant manufacturers. Annual investments in the sector, which averaged ₹1,500–2,000 crore between FY 22 and FY 25, increased to ₹3,600 crore in FY 26, with a further ₹2,500 crore announced so far in FY 27.
- 4. QCOs Supporting Farmers, Rural Economies, Employment and Environmental Sustainability:** QCO-driven growth in domestic manufacturing is supporting farmers' incomes, strengthening rural livelihoods, generating employment, and promoting agroforestry-led expansion of green cover, thereby contributing to climate mitigation and supporting India's NDCs goals.

Therefore, FIPPI respectfully requests NITI Aayog to support continued policy stability for QCOs. Kindly find enclosed a brochure on the impact of QCOs on the plywood and panel sector for your kind reference.

Thanking You,

Dr. M.P. Singh, Director General
Federation of Indian Plywood and Panel Industry (FIPPI)



Promoting Agroforestry-Led Industrial Development in Bihar: Policy requests for support to Agroforestry-Based Wood Industry as the High Priority Sector in Bihar



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FIPPI/POLICY-02/2026-27

04. June.2026

To
 The Chief Secretary,
 Government of Bihar,
 Patna, Bihar - 800015.

Subject: Policy support to Agroforestry-Based Wood Industry as the High Priority Sector in Bihar.

Respected Sir,

The Federation of Indian Plywood and Panel Industry (FIPPI) writes as the apex representative body of India’s plywood, veneer, flush door, MDF, particle board, and allied wood panel industries, which rely on wood sourced from agroforestry and farm forestry plantations as their primary raw material. As one of the country’s key agroforestry-based manufacturing sectors, the Indian plywood and panel industry has witnessed robust growth in recent years, supported by rising domestic demand. The industry has attracted investments exceeding ₹3,000 crore in a single year and continues to expand its production capacities across the country. With consumption expected to nearly double by 2030, the sector presents a substantial opportunity for states to attract investment, create large-scale employment, enhance farmer incomes through agroforestry, and strengthen rural economies.

In view of the sector’s immense potential, proactive policy support can enable states to realize substantial economic, environmental, and social benefits. In this context, we would like to acknowledge the Government of Bihar for recognizing the wood-based sector under the Priority Sector category in the Bihar Industrial Investment Promotion Package (BIIPP) 2025. As the Government of Bihar is presently formulating the upcoming Bihar Industrial Promotion Policy 2026, we respectfully request that the State Government specifically recognizes and include **“Agroforestry-Based Wood Industries”** under the **High Priority Sector** category. Such recognition would not only encourage sustainable industrial development but also create a strong linkage between agriculture and industry, enabling farmers to become active participants in Bihar’s economic growth.

The strategic importance of agroforestry-based industries has already been recognized by several progressive states, including Odisha, Gujarat, Andhra Pradesh, and Chhattisgarh, which have extended policy support and incentives to promote agroforestry-based wood industries. Such initiatives reflect the growing national recognition of agroforestry as a sustainable pathway for industrial growth, environmental conservation, and rural prosperity.

The promotion of agroforestry-based wood industry offers a unique opportunity to simultaneously achieve the objectives of industrial development, environmental sustainability, and rural transformation. By creating a stable and assured market for farm-grown timber, these industries encourage farmers to diversify their farming systems through the integration of trees on agricultural lands, thereby enhancing farm resilience and long-term income security. Such industries contribute significantly to the socio-economic upliftment of rural communities by creating sustainable livelihoods and strengthening local economies.

Furthermore, agroforestry plantations act as important carbon sinks, contributing to climate change mitigation and helping India meet its environmental commitments. Expansion of agroforestry also supports the national objective of increasing tree cover to 33 percent of the geographical area while reducing pressure on natural forests. Most importantly, the growth of agroforestry-based industries directly supports the vision of Hon'ble Prime Minister Shri Narendra Modi's initiative of **"Har Medh Par Ped"**, encouraging large-scale tree plantation on farmlands and transforming agriculture into a more sustainable and remunerative enterprise.

Bihar is particularly well-positioned to leverage these opportunities. In particular, the fertile Gangetic plains of Northern Bihar, endowed with rich alluvial soils, favourable climatic conditions and abundant water resources, offers immense scope for large-scale agroforestry plantations. The development of agroforestry-based industrial clusters in this region can create a sustainable model wherein farmers, industries and local communities grow together. Such a framework would strengthen rural incomes, attract private investment and create a long-term raw material base for value-added manufacturing within the state.

We would also like to draw your kind attention to the **MoEF&CC Guidelines for Establishment and Regulation of Wood-Based Industries, 2016, as amended in 2017**, which provide that industries utilizing exclusively agroforestry and plantation-grown timber are exempt from licensing requirements and need only register with the State Forest Department. This reform was introduced to promote agroforestry, facilitate ease of doing business, and encourage investment in sustainable wood-based industries. However, these provisions have yet to be effectively implemented in Bihar, creating regulatory hurdles that impede environmental amelioration along with industrial growth and limit opportunities for farmers. In this regard, FIPPI has already submitted a representation dated **13 March 2026 to the Principal Chief Conservator of Forests & Head of Forest Force, Bihar**, requesting implementation of the amended guidelines. A copy of the representation is enclosed as **Annexure-I** for your kind reference. For ready reference, a copy of the Punjab Wood-Based Industries Guidelines is enclosed as **Annexure-II**. The Punjab model demonstrates how effective implementation of the 2017 MoEF&CC amendments can promote agroforestry, attract investment, and support the development of a sustainable wood-based industry cluster.

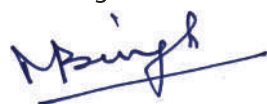
Considering the substantial economic, environmental, and social benefits associated with the agroforestry-based wood industry, we respectfully request the Government of Bihar to:

1. Classify Agroforestry-Based Wood Industries under the High Priority Sector category in the forthcoming Bihar Industrial Promotion Policy, 2026, thereby enabling the sector to realize its full potential in attracting investment, generating employment, and promoting rural development.
2. Facilitate the implementation of the amended MoEF&CC Wood-Based Industries Guidelines, 2017, which provide a simplified registration-based framework for industries utilizing agroforestry and plantation-grown timber.

We remain confident that timely policy support for agroforestry-based wood industries will deliver long-term benefits to Bihar's farmers, rural communities, environment and economy.

A suitable time may kindly be provided for a delegation from FIPPI to discuss these matters in greater detail and explore avenues through which Bihar can emerge as a leading centre for agroforestry-driven industrial development.

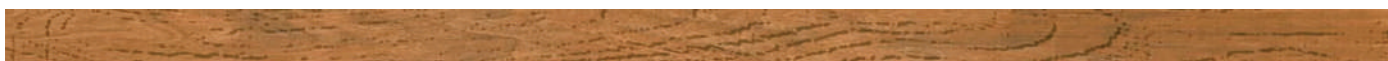
With regards



Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)

Copy to:

1. Secretary, Department of Industries, Govt. of Bihar.
2. Secretary, Bihar Forest Department, Govt. of Bihar



Facilitating Uniform Implementation of MoEF&CC Guidelines for Wood-Based Industries: FIPPI Seeks a Registration-Based Framework for Agroforestry-Driven Industrial Growth



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 DELHI 110 008, INDIA
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Chief Patron Mr. Sajjan Bhajanka	Patrons Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	President Mr. Rajesh Mittal	Senior Vice President Mr. Jaydeep Chitlangia	Vice Presidents Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Director General Dr. M.P. Singh
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FIPPI/Policy-03/2026-27

June 25, 2026

- To,
- Shri Tanmay Kumar, IAS**
Secretary,
Ministry of Environment, Forest and Climate Change,
Government of India, New Delhi.
 - Shri Sushil Kumar Awasthi, IFS**
Director General of Forests and Special Secretary (DGF&SS),
Ministry of Environment, Forest and Climate Change,
Government of India, New Delhi.

Subject: Request for Implementation of MoEF&CC Guidelines for Wood-Based Industries (Establishment and Regulation), 2016 as Amended in 2017

Kind attention: Shri Krishna Bahadur Singh, Inspector General of Forests (Survey & Utilization).

Respected Sir,

The Federation of Indian Plywood and Panel Industry (FIPPI) is pleased to submit that the plywood and wood-based panel industry (including MDF and particle board) is witnessing strong and sustained growth across the country. Plywood production has increased by nearly 15%, rising from 10 million cubic meters to 11.5 million cubic meters. The industry has attracted significant investments exceeding ₹3,000 crores, with several companies undertaking capacity expansion. The sector is now poised to fully utilize its installed capacity of 12 million cubic meters in plywood, along with 4 million cubic meters each in Medium Density Fibreboard (MDF) and particle board. Further, the consumption of plywood and panel products is projected to double by 2030.

This growth trajectory is closely linked to the industry’s reliance on agroforestry, which currently supplies approximately 92% of its timber requirements and rest 8% of the face veneer is being imported. The expansion of the sector is therefore intrinsically dependent on a supportive regulatory framework that facilitates the establishment and operation of wood-based industries aligned with agroforestry resources.

In this context, we sincerely appreciate the Ministry of Environment, Forest and Climate Change for introducing a progressive provision under paragraph 8 of the amended Wood-Based Industries Guidelines (2017). The amendment provides that:

Following industries/processing plants not using round logs of domestic origin or operating without a band saw or re-saw or circular saw of more than thirty-centimetre diameter shall not require license. Industries/processing plants which use:

Round log/timber from species declared as agroforestry/agricultural crops and/or exempted from the purview of the felling and transit regime in the concerned state/UT and procured from legitimate sources.

However, SLC of the concerned State may allow installation of circular saw of diameter upto 60 centimeter in such industries having specialized requirement.

Such industries shall be registered with the Forest Department of the concerned state/UT and shall be regulated, details of which are to be prescribed by the concerned state/UT.

However, despite the clear intent of the amendment introducing registration regime for industries sourcing raw material from agroforestry, its implementation remains uneven across States. It is also pertinent to highlight that in many States, the establishment of wood-based industries remains linked to wood availability studies and licensing approvals. In the context of agroforestry, wood availability is dynamic and expands with market demand, farmer participation, and plantation cycles. In several instances, proposals for new units have been denied due to non-acceptance of wood availability assessments/studies by State-Level Committees, despite increasing availability of plantation-grown timber.

Agroforestry delivers substantial environmental and socio-economic benefits. It enhances tree cover outside forests, contributes to carbon sequestration and climate change mitigation, improves soil and water conservation, and provides an additional and reliable source of income for farmers. It is highly labour-intensive sector employing more than 3.5 million labour and staff. Its expansion is therefore directly aligned with India's environmental and sustainable development goals.

Despite these advantages, the sector continues to face structural barriers. Experience indicates that farmers are encouraged to undertake tree plantation only when there is assured local demand and a viable market. In the absence of nearby wood-based industries, farmers often lack the economic confidence to invest in long-term plantation cycles. This, in turn, limits domestic timber production and increases dependence on imported wood and raw materials. With the increasing demand of plywood and panel products, industries are facing difficulties in establishing new units or expanding the capacity of existing unit except in Andhra Pradesh and Gujarat.

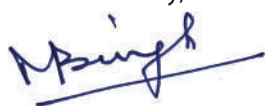
FIPPI has requested the PCCF (HoFF) of all states to implement the MoEF&CC guidelines on wood-based industries by incorporating the same into the State-level regulations, so as to facilitate the establishment of new plywood and panel industries (**Annexure -I**).

The effective and uniform implementation of the 2017 Guidelines across all States would enable the development of agroforestry-based industrial clusters, creating a virtuous cycle of increased plantation activity, stronger farmer-industry linkages, rural employment generation, and enhanced domestic timber availability. This would significantly reduce reliance on imports, conserve foreign exchange, and contribute to the vision of **"Atmanirbhar Bharat."**

In view of the above, we respectfully request the Ministry to consider issuing appropriate clarifications, advisories, or policy directions to ensure uniform interpretation and implementation of the amended Wood-Based Industries Guidelines across all States and Union Territories. Such measures would remove existing ambiguities, facilitate adoption of the registration-based framework envisaged under the 2017 amendment for plywood and panel industry without linkage to wood availability studies, and ensure better alignment between national agroforestry objectives and State-level regulatory practices.

We shall be grateful for your kind consideration of this matter. Thanking you,

Yours sincerely,



Dr. M.P. Singh
Director General
Federation of Indian Plywood and Panel Industry (FIPPI)



Creating an Enabling Policy Ecosystem for the Indian Plywood & Panel Sector: FIPPI Recommends Key Policy Reforms to NITI Aayog



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Chief Patron Mr. Sajjan Bhajanka	Patrons Mr. S.P. Mittal Mr. M.S. Vagh Mr. N.K. Aggarwal	President Mr. Rajesh Mittal	Senior Vice President Mr. Jaydeep Chitlangia	Vice Presidents Mr. Jikesh Thakkar Mr. Keshav Bhajanka	Director General Dr. M.P. Singh
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FIPPI/NITI/2026-27/02

June 29, 2026

To,
Shri Ashok Kumar Lahiri
Vice Chairman, NITI Aayog, New Delhi – 110001.

Subject: Requesting Reforms in Laws, Policies, Notifications, Rules & Regulations as Desired by the Hon’ble Prime Minister – Regarding Plywood and Panel Sector.

Respected Sir,

At the outset, we extend our warm congratulations on your appointment as the Vice Chairman of NITI Aayog. We are confident that under your leadership, NITI Aayog will continue to play a pivotal role in advancing reforms and strengthening India’s growth and development agenda.

We further take this opportunity to introduce the Federation of Indian Plywood and Panel Industry (FIPPI) – the apex body representing manufacturers and regional associations engaged in the production of plywood, medium-density fibreboard (MDF) and particle board across India. FIPPI is committed to advancing the interests of the wood-based manufacturing sector and serves as the principal voice of the industry in policy formulation and regulatory deliberations.

The recently enforced QCOs in the plywood and panel sector have initiated a significant transformation of the sector through import substitution, industry formalization and investment attraction, while establishing a level playing field for compliant manufacturers. In this view, FIPPI respectfully requests NITI Aayog to support continued policy stability for QCOs.

Further, in line with the Hon’ble Prime Minister’s emphasis on reviewing and simplifying laws, policies, rules and regulations to enhance ease of doing business and strengthen domestic manufacturing, we wish to draw your kind attention to the following policy and regulatory reforms that FIPPI has submitted to various Ministries and Departments of the Government of India in the recent past:

1. Enactment of a National Agroforestry Act
Submitted to: Ministry of Agriculture & Farmers Welfare

Currently, agroforestry-grown timber is subject to complex and non-uniform regulations across states, which discourage farmers from undertaking tree cultivation at scale and constrain domestic timber availability. FIPPI has proposed the enactment of a National Agroforestry Act to streamline timber movement, promote agroforestry, strengthen raw material security for wood-based industries and support the objectives of the National Agroforestry Policy, 2014. *(Annexure-I)*

2. Rationalization of Basic Customs Duty (BCD) to Promote Domestic Value Addition
Submitted to: Department of Revenue, Ministry of Finance

India continues to face a significant timber deficit, while certain imported timber-based raw materials (face veneers) remain indispensable for the manufacture of high-quality panel products. Accordingly, FIPPI has proposed reducing the BCD on Logs (HSN 4403), Sawn Wood (HSN 4407) and Veneers (HSN 4408) to 0%, while increasing the BCD on Plywood (HSN 4412), MDF (HSN 4411), Particle Board (HSN 4410) and Wooden Furniture (HSN 940330–940360) to promote domestic value addition, strengthen manufacturing competitiveness and support the objectives of Make in India and Atmanirbhar Bharat. *(Annexure-II)*

3. Reduction of BCD on Critical Chemicals (Not Substantially Manufactured in India) to 0%
Submitted to: Ministry of Chemicals and Fertilizers

The plywood and panel industry depends on critical chemicals such as Phenol (HSN 29071110) and Melamine (HSN 29336100), whose domestic availability remains inadequate to meet industrial demand. FIPPI has proposed reducing the BCD on such critical inputs to 0% to lower manufacturing costs and enhance the competitiveness of domestically manufactured plywood and panel products. **(Annexure-III)**

4. Introduction of Reverse Charge Mechanism on Purchase of Wood from Agroforestry under GST
Submitted to: Department of Revenue, Ministry of Finance

Currently, the supply of wood from agroforestry is subject to 18% GST, with the responsibility for tax compliance resting on the supplier. However, the agroforestry timber supply chain remains highly fragmented, with a significant share of procurement taking place from unregistered suppliers, creating challenges in GST compliance and seamless availability of input tax credit for registered manufacturers. FIPPI has therefore proposed the introduction of Reverse Charge Mechanism (RCM) on purchases of agroforestry-sourced timber to strengthen tax compliance, improve ITC flow, expand the tax base and accelerate formalization across the value chain. **(Annexure-IV)**

5. Implementation of Wood-Based Industries Guidelines, 2016 (As Amended in 2017)
Submitted to: Ministry of Environment, Forest and Climate Change

Indian plywood and panel industry has transitioned its sourcing from forest-based to agroforestry-based timber entirely following the disruptions in 1996 pursuant to the Hon'ble Supreme Court's judgment in T.N. Godavarman Thirumulpad v. Union of India. Further, pursuant to the National Agroforestry Policy, 2014, the MoEFCC amended the Wood-Based Industries (Establishment and Regulation) Guidelines in 2017 to facilitate the establishment of industries utilizing timber sourced from agroforestry and other exempted species. The amended guidelines provide for registration and regulation of such industries by State Governments instead of licensing requirements. However, most States (except Andhra Pradesh, Gujarat) have not implemented these provisions of registrations without linkage to the wood availability studies, constraining new investments and limiting the growth potential of our sector. FIPPI has therefore requested uniform implementation of the provisions of registration across States to remove existing ambiguities, facilitate adoption of the registration-based framework envisaged under the 2017 amendment for plywood and panel industry without linkage to wood availability studies, and ensure better alignment between national agroforestry objectives and State-level regulatory practices. **(Annexure-V)**

6. Establishment of a Development Council for Plywood and Panel Products
Submitted to: Department for Promotion of Industry & Internal Trade (DPIIT)

The plywood and panel industry is currently undergoing a structural transformation driven by the implementation of the QCOs. While these developments present significant opportunities for strengthening domestic manufacturing and enhancing global competitiveness, the sector lacks a dedicated institutional forum to represent the industry's interests before the Government. FIPPI has therefore proposed the reconstitution of the Development Council for Plywood and Panel Products, under the Industries (Development and Regulation) Act, 1951. The proposed Council would provide a formal platform for policy consultation, inter-ministerial coordination and long-term sectoral development, supporting the objectives of Make in India and Atmanirbhar Bharat. **(Annexure-VI)**

We trust that this representation will receive due consideration and that NITI Aayog will support expeditious implementation of the above policy reforms in line with the Hon'ble Prime Minister's emphasis on regulatory reforms, ease of doing business and strengthening domestic manufacturing.

Thanking You,

Rajesh Mittal
President, Federation of Indian Plywood and Panel Industry (FIPPI)

Copy to:

1. Shri Atish Chandra, Secretary, Department of Agriculture & Farmers Welfare, Ministry of Agriculture & Farmers Welfare
2. Shri Arvind Shrivastava, Secretary, Department of Revenue, Ministry of Finance
3. Shri Vivek Chaturvedi, Chairman, Central Board of Indirect Taxes & Customs (CBIC)
4. Shri Tejveer Singh, Secretary, Department of Chemicals & Petrochemicals, Ministry of Chemicals and Fertilizers
5. Shri Tanmay Kumar, Secretary, Ministry of Environment, Forests & Climate Change
6. Shri Amardeep Singh Bhatia, Secretary, Department for Promotion of Industry & Internal Trade (DPIIT)

Minutes of the Meeting of FIPPI Committee Meeting, held on 10th April 2026



Members' Present:

1. Shri Sajjan Bhajanka, Chief Patron, FIPPI
2. Shri M.S. Vagh, Patron, FIPPI
3. Shri N.K. Aggarwal, Patron, FIPPI
4. Shri Rajesh Mittal, President, FIPPI
5. Shri Jaydeep Chitlangia, Senior Vice President, FIPPI
6. Shri Jikesh Thakkar, Vice President, FIPPI
7. Shri Keshav Bhajanka, Vice President, FIPPI
8. Shri Akhilesh Chitlangia, Duroply Industries Ltd.
9. Shri Madhusudhan Lohia, Merino Industries Ltd.
10. Shri Krupesh Thakkar, Rushil Décor
11. Shri Jikesh Thakkar, Rushil Décor
12. Km. Tamanna, Rushil Décor
13. Shri Ajay Aggarwal, Action Tesa
14. Shri Vivek Jain, Action Tesa
15. Shri Ajay Garg, E3 Group
16. Shri S.R. Mundhra, ARCL Organics
17. Shri Mukesh Mundhra, ARCL Organics
18. Shri Pankaj Vaish, Jagdamba Wood Industries (Niceply)
19. Shri Kushagra Vaish, Jagdamba Wood Industries (Niceply)
20. Shri Sandeep Gupta, Northern Plywood Products
21. Shri Aditya Aggarwal, Northern Plywood Products
22. Shri Ujjwal Bansal, Birmi Wood Products (Treelab)
23. Shri Vinay Bansal, Birmi Wood Products (Treelab)
24. Shri Shivam Tibrewala, Oswin Wood Panels Pvt. Ltd.
25. Shri Ayush Gattani, Gattani Industries
26. Dr Prasanth M.A, A.K. Appleply Pvt. Ltd., South Indian Plywood Manufacturers Association
27. Shri Roshan Agarwal, Pashupati Veneer
28. Shri Ashok Agarwal, Plywood Manufacturers Welfare Association UP
29. Shri J.K. Bihani, Haryana Plywood Manufacturers Association
30. Shri Prakash More, Mayur Panel Pvt. Ltd.
31. Shri Hrishikesh Badamkar, Richwood Industries Pvt. Ltd.
32. Shri Aditya Bansal, R.P. Wood Products Pvt. Ltd.
33. Shri J.L. Ahuja, Indian Laminate Manufacturers Association (ILMA)

34. Shri Naveen Patel, Gujarat Plywood & Veneers Manufacturers Association
35. Shri Manish Kedia, Amit Decorative Plywood Pvt. Ltd.
36. Shri Pragath Dvivedi, Ply Reporter
37. Dr. M.P. Singh, Director General, FIPPI
38. Shri Ajay Kumar, Senior Economic Policy Advisor, FIPPI
39. Shri Anthony Fernandes, Office Secretary, FIPPI
40. Dr. Richa Bansal, Assistant Director, FIPPI
41. Shri Rishabh Gandhi, Economic Officer, FIPPI
42. Km. Kavita Goyal, Office Assistant, FIPPI

The Federation of Indian Plywood and Panel Industry (FIPPI) convened its Management Committee Meeting on 10 April 2026 in New Delhi to review activities undertaken between January and March 2026, assess progress on key industry and policy matters, and deliberate on the strategic direction for the forthcoming period. The meeting was attended by office bearers, members, patrons, representatives of regional associations, and invited experts. Discussions covered organisational matters, product standardisation, raw material sustainability, trade and taxation, policy advocacy, and the release of the FIPPI quarterly magazine (Volume 20, Issue 1, January–March 2026). The impact of the West Asia conflict on the plywood and wood-panel industry and the availability of chemical inputs including Urea was also deliberated.



Presidential Address — Shri Rajesh Mittal, President, FIPPI & CMD, Greenply Industries

The President welcomed Patrons, Office Bearers, Managing Committee members, and industry representatives and presented an overview of FIPPI's key initiatives during the quarter.

He noted that FIPPI strengthened its communication and outreach through thought-leadership and awareness campaigns, including the article "Quality as Nation Building: The Wood Panel Industry's New Chapter" in The Pioneer and a full-page awareness campaign on Quality Control Orders (QCOs) in The Times of India across all editions. He acknowledged the continued support of members in these efforts.

On products and standards, he reported that following consultations with DPIIT and industry stakeholders — including a successful B2B interaction at IndiaWood 2026 — FIPPI has initiated the showcasing of innovative and specialty products developed by Indian plywood and panel manufacturers through the Federation's publication platform, particularly to address the needs of the furniture manufacturing sector.

On raw material sustainability, the President highlighted FIPPI's advocacy for the transition to urea-free and bio-based resin technologies, supported by research contributions from IWST and industry experts. He informed members of the finalisation of a collaborative research project with ICFRE-IWST to evaluate and deploy high-yielding clones, aimed at strengthening raw material security and industry-research-farmer linkages.

On trade and taxation, he stated that FIPPI is addressing non-BIS-compliant imports through engagement with DPIIT, CBIC, and BIS, and has submitted proposals for a graded Basic Customs Duty (BCD) structure and for a Minimum Import Price (MIP) to curb under-invoicing. He urged members to provide the HSN-wise data, import prices, cost sheets, and production-consumption information requested by DPIIT for examination of the MIP proposal.

On policy and advocacy, he highlighted FIPPI's continued engagement on implementation of the Wood-Based Industries (WBI) Guidelines, 2017, promotion of private forestry, advocacy for a National Agroforestry Act, and inclusion of timber species in national agricultural statistics.

He also noted steady growth in the Federation's membership base and requested members to renew their memberships and encourage wider participation.

Addressing the West Asia conflict, the President cautioned that the situation will have both immediate and long-term implications, particularly through rising fuel and gas prices, cost pressures across the value chain, and potential supply-chain disruptions. He advised members to remain prepared and adopt proactive measures.

He thanked all Patrons, Office Bearers, members, and

the FIPPI Secretariat for their continued support, and invited Shri Sajjan Bhajanka, Chief Patron, FIPPI & Chairman, Century Plyboards, to share his guidance.

Special address — Shri Sajjan Bhajanka, Chief Patron, FIPPI & Chairman, Century Plyboards

Shri Bhajanka welcomed members attending both physically and virtually and congratulated Shri Rajesh Mittal, Dr. M. P. Singh, and Shri Jaydeep Chitlangia for strengthening the Federation. He observed that, over the past year, FIPPI has emerged as a proactive and credible platform, with various Ministries increasingly recognising its contributions.

Geopolitical perspective - He noted that conflicts of this nature tend to arise roughly every decade and rarely persist for long due to the scale of economic disruption involved. He observed that de-escalation between Iran and the United States may reduce immediate risks to global oil supplies. Citing the strategic importance of the Strait of Hormuz, he noted that, under international norms, restrictions or tariffs on maritime movement are unlikely to persist. He added that the easing of sanctions on Iran offers logistical and economic advantages for India, while cautioning that any major disruption could have medium- to long-term implications on pricing and supply stability.

Quality enhancement - Shri Bhajanka strongly emphasised improving product quality over competing on price alone. Tracing the evolution of global leadership in wood panels — from Europe to Japan and then to China — he positioned India as the next potential manufacturing leader. He noted that Indian plywood and laminates are already perceived as superior to many Chinese alternatives, particularly in American and European markets, and that superior quality can command price premiums of up to 100 per cent (for example, from USD 300 to USD 600 per cubic metre), thereby strengthening India's global competitiveness.

Manufacturing evolution - He highlighted the industry's progress in producing superior-quality plywood from plantation-grown raw materials (with recovery rates of 45–50 per cent), which is technically superior to earlier products made from natural hardwoods such as Hollong and Makai used in Assam in the 1970s.

Future outlook - Describing the next two decades as "wonderful years" for the industry, he addressed the earlier misconception that plywood growth would decline with the rise of MDF and particle board. Citing China's experience, where all three segments have grown concurrently, he noted that India's climatic conditions provide a distinct advantage for plywood. He remarked that substantial quality improvements do not necessarily require heavy investments — a modest cost increase of around 5 per cent can result in nearly a 100 per cent improvement in quality. He also recognised the vision and contributions of Shri N. K. Aggarwal, Patron, FIPPI & Chairman, Action Tesa, in establishing a leading MDF operation and introducing innovative products.

Institutional collaboration - He suggested leveraging

the expertise of Dr. M. P. Singh and the infrastructure of IWST to drive industry-wide quality improvement and congratulated the organising team for convening this meaningful deliberation at the start of the new financial year.

Dr. M. P. Singh thanked Shri Bhajanka for his valuable guidance and invited Shri N. K. Aggarwal to share his views.

Shri N. K. Aggarwal, Patron, FIPPI & Chairman, Action TESA

Drawing from over 56 years of industry experience, Shri Aggarwal endorsed the view that “quality always pays.” He observed that customers consistently value quality and are willing to pay a premium of 5–7 per cent for superior products. Citing the example of Amul, he noted that its strong market position is built on consistent quality and standardisation. Drawing a parallel with the plywood and panel industry, he underscored the need to build a similar perception — wherein all products of the industry are associated with assured quality — and reiterated that quality finished goods depend on the use of high-quality inputs.

Shri Moiz Vagh, Patron, FIPPI & Managing Director, Hunsur Plywood Works

Shri Vagh expressed appreciation for the industry’s shift towards quality, emphasising that “only great quality will help us in the long term.” He commended FIPPI’s advocacy work and expressed confidence that ongoing policy efforts would yield positive outcomes for the industry.

Shri Jaydeep Chitlangia, Senior Vice President, FIPPI & Mentor, Duroply Industries

Shri Chitlangia emphasised the need to strengthen the Federation financially for more efficient functioning and requested members to submit renewal contributions promptly. He stressed the urgency of transitioning to urea-free or bio-based resin technologies, noting that existing resin systems are vulnerable to supply disruptions, as evident from recent geopolitical developments in West Asia: “the faster we adopt these bio-based resin technologies, the faster they will gain acceptance.”



He also emphasised that wood-based industries and products are among the most sustainable in the country, and globally, within the category of building materials. Drawing

analogies with certification marks used for wool and gold, he proposed that the industry develop a logo signifying that raw materials are sourced from agroforestry plantations. Such a mark, taken up at the Federation level for approval and adopted by members in branding and advertising, would dispel the misconception that the industry depends on natural forests and would build consumer confidence.

Action Taken Report on FIPPI Roadmap

1. Products and Standards

Dr. Singh briefed the forum on activities under the Products and Standards thematic area. Referring to the meeting with DPIIT on 20 January 2026, convened following concerns raised by the furniture industry on the non-availability of specialty plywood and panel products, he informed that FIPPI had invited industry contributions highlighting the availability of such products. These articles now feature in the latest issue of the FIPPI magazine, creating awareness among stakeholders and relevant Government departments. Members were requested to share information on any new or innovative products for inclusion in future issues.

On the upcoming CED 20 meeting in May, he requested members to share key agenda points — citing, as an example, the concern regarding the green colour of MDF boards raised previously. He also expressed appreciation to the ten (10) industry members (Century Plyboards, Action Tesa, Greenply, Greenpanel, Greenlam, Rushil Décor, Duroply, Merino, Virgo Group, E3 Group) who contributed to a nationwide message published in The Times of India on 28 February 2026, marking one year of QCO implementation.

2. Raw Material Sustainability

A. Glue: Dr. Singh noted that the current magazine features articles from IWST scientists (Mamatha B. S. and Sujatha D.) and resin expert Shri H. Vaidyanathan outlining the roadmap for adoption of sustainable resin

alternatives. He encouraged member industries to actively pursue alternatives to urea-based systems. He also informed the forum of the project on extension and adoption of bio-based (soya) adhesives assigned to IWST for the plywood segment, and proposed that similar projects be undertaken for MDF and particle board segments.

Shri Vivek Jain, Managing Director, Action TESA, informed the forum that Action TESA, under the leadership of Shri Rajeshwar Nair, Vice President and Plant Head, is already in discussions with IWST for a similar project covering MDF and particle board, and that project details would be shared with FIPPI. Dr. Singh appreciated this proactive effort, requested the early sharing of details, and encouraged four to five industry players to collaborate to accelerate results.

Shri Vivek Jain highlighted that the availability and pricing of technical-grade urea needs to be pursued more seriously. In China, resin manufacturers are supplied technical-grade urea at government-directed prices of approximately ₹25–26

per kg (inclusive of delivery), placing Indian manufacturers at a significant competitive disadvantage. He stated that the current Government is pro-industry and would be receptive if the matter is represented appropriately.

Dr. Singh informed that FIPPI had earlier raised the issue with the Department of Fertilizers, which conveyed that technical-grade urea does not fall within its purview. He suggested that the matter may be taken up with the appropriate Parliamentary Committee. Shri Ajay Aggarwal, Managing Director, Action TESA, suggested advocating for a subsidy mechanism similar to the one available in China. Shri N. K. Aggarwal recalled that he and Dr. Singh had earlier met the Secretary, Department of Fertilizers; however, the response was unsatisfactory, as the Government was of the view that the industry largely relies on diverted, agriculture-allocated urea and is mostly non-compliant.

Shri Sajjan Bhajanka observed that, of more than 2,000 plywood factories in the country, many face survival challenges, and it is extremely difficult to persuade small manufacturers to use urea at around ₹50 per kg instead of ₹10 per kg for glue preparation in the absence of a level playing field. Such a transition would require strict enforcement rather than voluntary compliance. He recalled the earlier measure of introducing neem in agricultural urea — colouring it green to prevent diversion for industrial use — and observed that plywood and melamine manufacturers in China benefit from regular government supply of affordable technical-grade urea.

Noting that a substantial portion of urea in India is produced in government plants at costs of around ₹20 per kg, he suggested that the industry should collectively advocate for subsidised technical-grade urea from government plants. A supply at ₹20–25 per kg would discourage diversion to agriculture (where urea is available at ₹8–10 per kg) while providing the industry a balanced solution. He noted that Century Plyboards and Greenply Industries do not use agricultural urea — his factory uses phenol or melamine-based systems and outsources MR-grade material entirely. Shri Bhajanka further added that his MDF and particle board plants are not licensed to manufacture glue and therefore procure it externally.

Shri N. K. Aggarwal, Chairman, Action TESA and Shri Madhusudan Lohia, Director, Merino Industries, informed the forum that their industries are using 100% technical grade urea in their in-house resin manufacturing plants and incurring higher costs compared to resin supplied in the market by resin manufacturers. They highlighted that they are not getting level-playing field as other panel manufacturers in the country continue to rely on externally sourced urea-based resins, which may be linked to the use of subsidised agricultural-grade urea or other non-compliant resin suppliers for cost advantage.

Shri Chitlangia clarified that at the urea factory gate there is no distinction between grades — classification

into technical and subsidised agricultural grades occurs thereafter. He stressed the need for concerted efforts to secure technical-grade urea at competitive prices and informed the forum that Duroply Industries meets 100 per cent of its urea requirement through imports.

Shri Rajesh Mittal, President FIPPI clarified that FIPPI has already highlighted the issue of technical grade urea before the government and is pursuing the matter. FIPPI has issued advisory to all members in this regard, but enforcement of fertilizer control orders is with the government agencies. FIPPI is providing all support and information for compliance enforcement to DPIIT and Ministry of Chemical and Fertilizers.

Shri Keshav Bhajanka, Vice President, FIPPI and Executive Director, Century Plyboards, observed that structural changes and external shocks — such as the ongoing West Asia crisis — have historically benefited organised Indian manufacturers and should be viewed as short-term challenges rather than long-term setbacks. Advocating a collaborative approach, he requested Shri Vivek Jain, along with Dr. M. P. Singh and other industry leaders, to take up the matter of technical-grade urea with the Parliamentary Committee and concerned Ministries. He further proposed including technical-grade urea compliance as a formal agenda item in the Annual General Meeting to enable wider member participation in a collective decision. Shri Vivek Jain concurred and confirmed that necessary efforts would be undertaken.

Shri Ashok Agarwal, President, Plywood Manufacturers Welfare Association (U.P.), shared that member units discontinued urea use two months ago and have adopted bio-resin. Urea is generally not required, except in minimal quantities for overlay applications in calibrated ply. Bio-resin is pH-sensitive and requires proper process control, but is more economical than agricultural urea, and the transition is a significant, forward-looking step for industry sustainability. Shri Sajjan Bhajanka welcomed this transformation.

Shri J.K. Bihani, President, Haryana Plywood Manufacturers Association, noted that urea remains a major concern. Several units in his cluster that earlier produced resin in-house using technical-grade urea now procure resin externally. He cautioned that bio-resin has a shorter shelf life, posing operational risks if a batch spoils. He also suggested reintroducing the earlier CWR grade of plywood in the relevant standards, which could reduce urea requirement to nearly one-third of current levels.

Shri Sandeep Gupta suggested that, given the unsatisfactory Government response, efforts should focus on greater adoption of bio-resin rather than subsidy support for technical-grade urea. Shri Sajjan Bhajanka recommended that Shri Rajesh Mittal and Dr. Singh explore the feasibility of extending bio-resin systems to MDF and particle board, noting that such a development could be transformative, especially for eco-conscious markets such as Europe.

Shri Vivek Jain further informed the forum that, based

on his cost estimates, the differential in panel manufacturing costs arising from compliant urea procurement versus non-compliant (subsidised agricultural urea diverted for glue manufacturing) is approximately 7–8 per cent.

Shri Rajesh Mittal noted that FIPPI would intensify work on bio-resin systems and continue collective advocacy for adequate availability of technical-grade urea at subsidised prices. He informed the forum that Greenply Industries has commenced using approximately 30 per cent bio-resins in plywood manufacturing and would work aggressively to increase this share and promote wider adoption.

Shri Mittal then invited Shri S. R. Mundhra, Chairman & Managing Director, ARCL Organics, to share his views.

Shri Mundhra reiterated that FIPPI represents not only plywood but also MDF and particle board segments, where urea-formaldehyde (UF) resin is indispensable. He noted that technical-grade urea prices have risen sharply and

suggested that the first step is identifying the appropriate Government authority, as continued representation to the Department of Fertilizers has not yielded results. He proposed that technical-grade urea be priced only on variable costs, with overheads absorbed by the subsidised agricultural segment, which accounts for over 99 per cent of consumption.

On the geopolitical situation, he observed that even with a ceasefire and reopening of the Strait of Hormuz, normalisation may take up to six months given uncertainties regarding infrastructure damage and supply restoration. He informed that India imports approximately 5 million tonnes of methanol — a key input for formaldehyde — largely from Gulf countries such as Iran, Saudi Arabia, and Qatar, and that while prices may gradually soften, availability from the affected regions may take at least six months to return to normal.

B. Plantation project - Dr. M. P. Singh informed members of the finalisation of the project "Evaluation and Extension of Clones/Varieties Developed by ICFRE for the Plywood and Panel Industry," in collaboration with ICFRE-IWST. The project will be implemented over three years at an estimated cost of ₹156.34 lakhs, jointly supported by a tentative contribution of ₹30 lakhs from each of Century Plyboards India Ltd., Greenply Industries Ltd., Balaji Action Buildwell Pvt. Ltd. (Action TESA), Greenpanel Industries Ltd., and Greenlam Industries Ltd. He requested approval for signing the MoU with ICFRE. The proposal was unanimously approved.

Shri N. K. Aggarwal observed that the selected species appeared more suitable for plywood than for MDF and particle board. Dr. M. P. Singh clarified that screening and evaluation would address both plywood and panel segments, noting that plywood typically requires higher lignin content than clones developed for paper manufacture, and the project would therefore cover different product segments.

3. Trade and Taxation

Dr. Singh reported that recent post-QCO import analyses show continued inflows from countries without BIS-licensed manufacturers — plywood from Vietnam and China, MDF from China and Germany, and particle board from Malaysia and Germany. FIPPI will pursue the matter with DPIIT, CBIC, and BIS to address loopholes, and he requested regional associations to formally represent the issue. With foreign manufacturers now being granted licenses, FIPPI is actively pursuing the MIP proposal, and DPIIT has sought detailed data for examination.

Dr. Singh informed the members that the latest issue of the magazine includes detailed article on Trade Defence Mechanisms: Safeguarding Domestic Industry Through Strategic Interventions. He further mentioned that FIPPI is already participating in anti-dumping proceeding on melamine from China. He sought permission to participate in the Anti-dumping Duty proceeding initiated on Phenol from Saudi Arabia, Singapore, South Africa, South Korea, Taiwan, Thailand and USA. The proposal was unanimously approved.

On GST, FIPPI's representation to reduce the rate to 5 per cent on plywood and wood-panel products is under Government consideration. As the matter requires a policy and political decision, sustained collective effort is needed. He emphasised projecting plywood and panel products as among the most sustainable materials, sourced primarily from agroforestry rather than natural forests — the industry having moved away from natural forests nearly three decades ago, with over 95 per cent of raw material now sourced from agroforestry timber. He urged members to incorporate this message in their advertising.

Shri Sandeep Gupta apprised the forum of his meeting with Shri Arvind Shrivastava, Secretary, Department of Revenue, in August 2025, during which it was conveyed that reduction of GST on plywood and panel products from 18 per cent to 5 per cent is not under consideration, whereas GST reduction on timber from 18 per cent to 5 per cent is. He emphasised concerted advocacy for GST reduction on timber.

Dr. Singh further informed that FIPPI had submitted a representation on the Reverse Charge Mechanism (RCM); process simplification may be considered by the GST Council Committee, though rate changes are unlikely until the requisite political approval is obtained.

4. Policy and Advocacy

Dr. Singh briefed members on FIPPI's policy and advocacy efforts. He recalled that FIPPI had submitted representations to the PCCF & HoFF in all states urging implementation of the MoEF&CC 2017 guidelines on regulation of wood-based industries and the Government of India guidelines dated 2 January 2026 on private forest participation in timber supply. Members were encouraged to use the details in the latest FIPPI magazine to drive state-level implementation.

He highlighted FIPPI's representation to Shri Shivraj Singh Chouhan, Hon'ble Minister of Agriculture & Farmers Welfare, advocating for enactment of a National Agroforestry Act to eliminate regulatory barriers and promote farm-grown timber. FIPPI is pursuing an appointment with the Minister, noting that this remains a political decision. He also outlined FIPPI's recommendation to include select timber species in the "Agricultural Statistics at a Glance" publication to improve the visibility of agroforestry in national data.

5. Communication and Outreach

Dr. Singh informed members that FIPPI's membership now stands at 45 primary members, 19 affiliated associations, and 2 associate members. He requested renewals; invoices have been issued and the remaining are being dispatched.

He reported active participation in major industry exhibitions such as MATECIA and IndiaWood 2026, which generated strong interest. Nine industries submitted membership forms during these events, though follow-ups were temporarily paused due to the prevailing West Asia crisis. FIPPI remains optimistic about continued growth.

He also informed that Bharat Buildcon 2026, supported by the Ministry of Commerce and Industry, has been rescheduled to 18–21 June 2026 at Yashobhoomi (IICC), New Delhi. The Joint Secretary is regularly conducting review meetings — FIPPI participated in one on 9 April 2026 — and a full-page advertisement for the event is included in the latest magazine. Given the limited response from the plywood industry so far, he urged members to reconsider and participate.

Dr. Singh then opened the floor for member views and suggestions.

Shri Pragath Dvivedi, Technical & Economic Advisor, FIPPI & Founder, Ply Reporter

Shri Dvivedi observed that the industry is growing at a healthy pace and that differences of opinion can be constructive. On urea, he cautioned that imported technical-grade urea may become unavailable in India over the next two years — Qatar and Iran being key suppliers — and noted that, unlike petroleum, no reserve mechanism exists for urea. He urged the industry to identify alternatives and promote their adoption across the entire panel sector. On standardisation, he suggested that FIPPI lead the development of clearly defined, BIS-certified grades, citing HDHMR in MDF as an example, to build consumer trust. He also encouraged greater participation of smaller industries in plantation activities and appreciated Government support in regulating imports.

Shri Jikesh Thakkar, Vice President, FIPPI & Senior Vice President, Rushil Décor

Drawing on two decades of experience pursuing MIP, safeguards, and anti-dumping matters on behalf of ILMA, Shri Thakkar underscored the critical importance of reliable

industry data for any trade remedy or GST rationalisation petition — their first case on phenol having been dismissed early due to inadequate supporting data. Citing ILMA's earlier experience, he recalled that a delegation's engagement with the Ministry of Fertilizers had resulted in raids with severe industry impact, and concurred with Shri Keshav Bhajanka that strong leadership is required to take the matter forward at the policy level. Highlighting sector growth, he noted that MDF capacity has grown from around 4,000 cubic metres per day in 2018 to approximately 14,000–15,000 cubic metres per day today, while particle board capacity has tripled in the same period. He expressed confidence in continued substantial expansion over the next five to six years.

Dr. Prasanth M. A., Director, AK Apple Ply

Dr. Prasanth informed members that his organisation discontinued urea-based resins approximately ten months ago and now uses over 90 per cent bio-resin. While the transition involved challenges, outcomes have been highly encouraging. Noting that the ongoing global conflict has entered its 41st day with material prices rising, he emphasised the need to adapt. On the Furniture QCO notification, Dr. M. P. Singh clarified that the relaxation pertains only to old stock and the overall status of QCOs is unchanged, with imports reducing significantly. Dr. Prasanth appreciated BIS's incorporation of industry feedback in standards and the streamlining of factory inspections and sample selection, and emphasised the need to regulate foreign licenses more effectively.

Shri Ajay Garg, Managing Director, E3 Group

Mr. Ajay Garg, Managing Director at E3 Group, emphasised the need to expand FIPPI's membership base, urging that members of regional associations should also enrol directly with FIPPI to strengthen the Federation and enhance its effectiveness in representing industry interests.

He highlighted that the issue of urea remains a significant concern for the industry. He remarked that regulatory oversight has expanded beyond the Agriculture Department to include the GST Department, with recent raids targeting the use of agricultural urea. However, he noted that despite such actions, the situation remains largely unchanged. He further observed that while earlier only 3–4 manufacturers operated in the Kashipur region, the number has now increased significantly, with over 30 manufacturers currently engaged in urea resin production. He suggested that a viable solution could be explored at the Ministry level by creating a dedicated quota for industrial use of urea to ensure a stable supply. He further clarified that GST authorities have not targeted plywood, MDF, or particle board manufacturers who are not directly procuring agricultural urea.

While appreciating the adoption of bio-resins in plywood manufacturing, he noted that similar transitions in the MDF and particle board sectors have not yet been adequately studied.

Shri Manish Kedia, Managing Director, Bhutan Tuff

Attending his first Federation meeting, Shri Kedia reflected on FIPPI's role in addressing the current challenges of abnormal price fluctuations and supply-chain disruptions. He emphasised unity, patience, and a balanced approach, suggesting that manufacturers may gradually rationalise prices through suitable adjustments, and stressed the need to collectively highlight pricing concerns and strengthen industry confidence through the Federation. Shri Rajesh Mittal concurred, noting that the recent increase in prices is likely to persist over the long term.

Shri Ajay Kumar, Senior Economic Policy Advisor, FIPPI

Shri Ajay Kumar observed that every mature industry must adapt to external shocks. Referring specifically to the plywood and panel sector, he stated that the cost index linked with imported inputs has already increased by nearly 60 per cent and is likely to remain elevated for the next eight months. He informed the members that he has contributed an article on the war situation and its impact on the plywood and panel industry in India, and noted that chemical input

costs are expected to remain high for the next six to eight months.

Vote of Thanks



The meeting concluded with a vote of thanks proposed by Dr. M. P. Singh, who observed that the deliberations had been highly important and timely, and expressed gratitude for the gracious presence and active participation of members. □

FIPPI Holds Strategic Discussions with DPIIT on Implementation of QUALITY CONTROL ORDERS (QCOs) for Plywood & Panel Industry



A delegation from the Federation of Indian Plywood & Panel Industry met with Shri Sumeet Kumar Jarangal, Joint Secretary, DPIIT and Shri Mohd. Isharar Ali, Director, DPIIT, on 13 May 2026 to discuss key issues concerning the plywood and panel industry, particularly the impact and ongoing transformation arising from the implementation of Quality Control Orders (QCOs) in the sector.

The discussions also focused on matters related to Technical Grade Urea and Environmental Clearance (EC) permissions affecting the industry.



The FIPPI delegation included:

- Mr. Rajesh Mittal, President FIPPI
- Dr. M. P. Singh, DG FIPPI
- Mr. Jikesh Thakkar, Vice President, FIPPI
- Mr. Naresh Tewari, Chairman AIPMA
- Mr. Inderjit Singh Sohal, President Punjab Plywood Manufacturers Association

The meeting provided an opportunity for the industry representatives to present their concerns and perspectives regarding regulatory developments and the future growth of the plywood and panel sector in India. □

FIPPI Participates in Stakeholder consultation on QCOs under the High- Level Committee on Non- Financial Regulatory Reforms at NITI Aayog on 3 June 2026

A High-Level Committee on Non-Financial Regulatory Reforms (HLC-NFRR) was constituted under the chairmanship of Shri. Rajiv Gauba, Member, NITI Aayog vide Cabinet Secretariat Notification dated 19th August 2025. The Committee has been mandated to review existing non-financial sector regulations, certifications, licences, and permissions with the objective of developing a modern, flexible, people-friendly, and trust-based regulatory framework suited to the needs of the 21st century.

Various thematic Working Groups have been constituted under the HLC to identify key areas for non-financial regulatory reforms. Working Group-6, constituted to examine reforms pertaining to "Certification Bodies", has been entrusted with undertaking a detailed review of issues relating to certification bodies, including the regulatory framework governing Quality Control Orders (QCOs) and related certification processes.

In this context, a Stakeholder Consultation on Quality Control Orders (QCOs) was held on 3 June 2026 at NITI Aayog. The session was chaired by Shri Ishtiyaque Ahmed, Secretary-High-Level Committee & PD, Industry & Foreign Investment Division, NITI Aayog.



A delegation from the Federation of Indian Plywood and Panel Industry (FIPPI) participated in the meeting.

FIPPI submitted a representation along with a brochure, highlighting the importance of continued policy stability for Quality Control Orders (QCOs) covering plywood and wood-based boards. The enforcement of Quality Control Orders (QCOs) has fundamentally reshaped market dynamics by strengthening domestic manufacturing, enhancing product quality, increasing BIS compliance, and promoting a level playing field for the industry. The key highlights of the representation included:

- **QCOs have significantly enhanced consumer confidence** by ensuring the availability of quality plywood and panel products, while empowering carpenters with reliable materials and supporting the objectives of the PM Vishwakarma Scheme.
- **The implementation of QCOs has accelerated industry formalization**, increasing the compliance rate from approximately 25% to 70%, creating a level playing field for compliant manufacturers, and curbing the circulation of substandard products.
- **QCOs have driven substantial investments and domestic manufacturing growth** through import substitution and improved investor confidence, with sectoral investments rising to ₹3,600 crore in FY26 and an additional ₹2,500 crore announced in FY27.
- **The expansion of domestic manufacturing under the QCO regime is benefiting farmers, rural livelihoods, and employment**, while promoting agroforestry, expanding green cover, and contributing to India's climate and sustainability goals.

The meeting concluded with constructive deliberations on strengthening India's quality ecosystem and ensuring a balanced regulatory framework that promotes both ease of doing business and product quality. FIPPI reiterated that continued policy stability for QCOs is essential to sustain industry formalization, encourage investments, strengthen consumer confidence, and support the long-term growth and global competitiveness of India's plywood and panel industry. □

*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*

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World Environment Day- 5 June 2026

Workshop on Innovative Approaches on the Development of Urea-Free Resin: Open Discussion & Need for Validation

Organised by FIPPI & ICFRE-IWST, Bengaluru

1. Overview and Core Objectives

To commemorate World Environment Day 2026, the Federation of Indian Plywood & Panel Industry (FIPPI), in collaboration with ICFRE – Institute of Wood Science and Technology (IWST), Bengaluru, organised a hybrid workshop titled “Innovative Approaches on the Development of Urea-Free Resin: Open Discussion & Need for Validation.” The event provided a vital collaborative platform for researchers, scientists, industry experts, and stakeholders to deliberate on emerging technologies for the development of urea-free resin systems, focusing on research advancements, industrial validation, scalability, and commercial adoption within the Indian plywood and wood panel industry.

The key strategic and environmental drivers discussed during the workshop include:

- Increasingly stringent global and domestic environmental regulations concerning formaldehyde emissions.
- Rising public health awareness among consumers and an increasing willingness to pay a premium for low- or zero-formaldehyde emitting sustainable products.
- Market volatility, raw material price fluctuations, and periodic supply shortages of conventional urea and methanol, which threaten the long-term economic stability of the wood panel sector.

2. Welcome Address by Director, IWST

The programme commenced with the inaugural address by Dr. Shakti Singh Chauhan, Director, ICFRE-IWST, who welcomed inaugural speakers, scientists and the participants. He underscored the importance of robust collaborative research and industry institution partnerships in advancing

sustainable technologies for the wood-based panel sector. He highly appreciated FIPPI's proactive initiative in bridging the gap between research groups and industry stakeholders on a single platform.

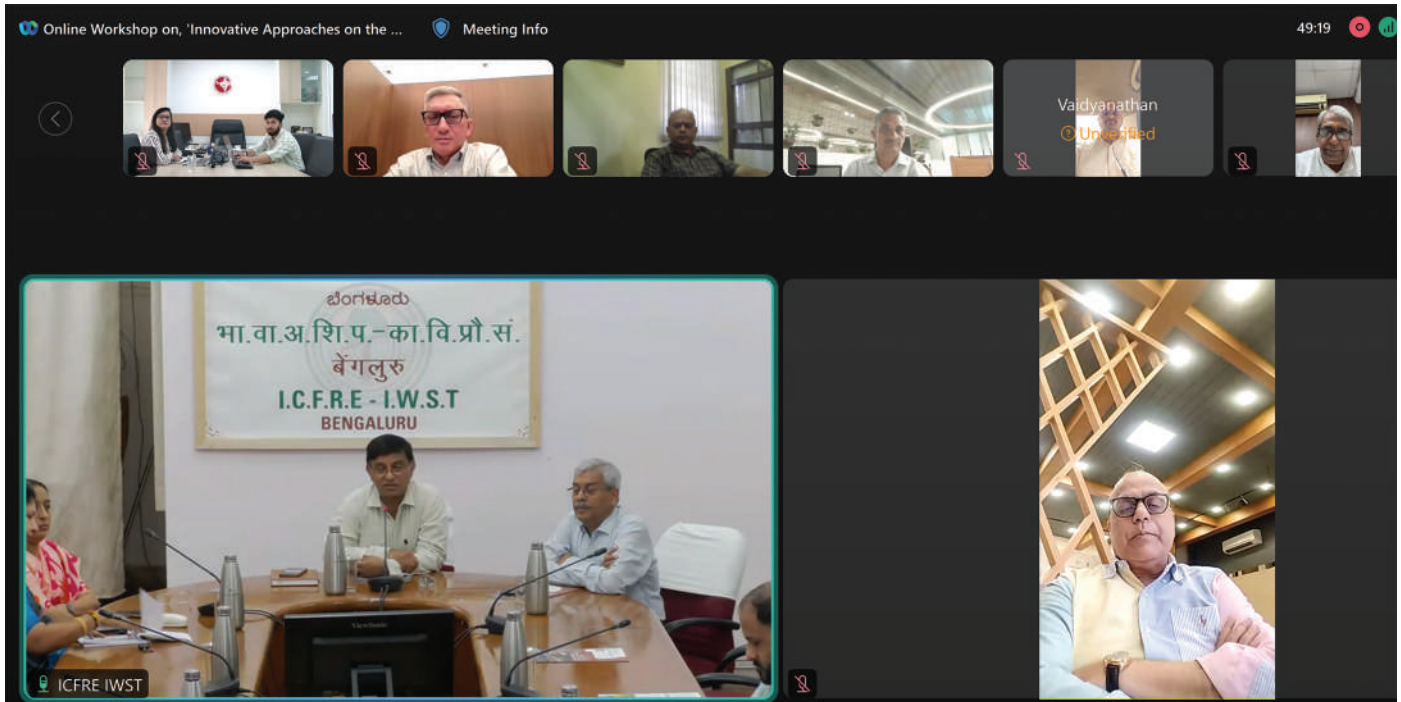
3. Inaugural Address by President, FIPPI

The Director, IWST, welcomed Shri Rajesh Mittal, President, FIPPI, and Chairman & Managing Director, Greenply Industries Limited. In his address, Shri Mittal congratulated FIPPI and IWST for organising the workshop and appreciated the initiative of bringing together industry leaders, researchers, and scientists on a common platform to jointly address the evolving needs of the wood panel sector.

He emphasised the growing importance of developing and adopting alternative resin technologies in response to increasingly stringent environmental regulations, volatility in raw material prices, periodic shortages of urea, and the rising global demand for sustainable products. Referring to the ongoing project on “Extension and Adoption of Bio-Based Adhesives”, being undertaken by IWST with the support of FIPPI members, he expressed confidence that strengthened collaboration between research institutions and industry would significantly accelerate the commercialisation and widespread adoption of bio-based adhesive technologies.

While addressing he reaffirmed FIPPI's commitment to work closely with IWST and discussed the technological challenges that the industry is currently facing and requested the Institute to innovate the bio-based adhesive systems that are commercially viable, technically robust, and readily adoptable by plywood manufacturers across India. Expressing optimism about the future, he stated that FIPPI firmly believes the Indian plywood industry is well positioned to progressively transit towards urea-free resin technologies, thereby paving the way for a more sustainable





and environmentally responsible manufacturing ecosystem.

4. Technical Session 1

Presenter: Dr. Mamatha B. S., Scientist, IWST

Dr. Mamatha shared the Institute's ongoing research and breakthroughs in soya-based phenolic/amino adhesive systems aimed at developing Boiling Water Resistant (BWR) and Moisture Resistant (MR) grade plywood. Dr. Mamatha shared the Institute's ongoing research on soya-based adhesive systems aimed at reducing dependence on conventional urea-based resins. Her presentation highlighted the key environmental, regulatory, and market drivers accelerating the transition towards alternative resin technologies, including growing concerns over formaldehyde emissions, fluctuations in raw material availability, and the increasing emphasis on sustainability in both domestic and international markets. Dr. Mamatha also highlighted the growing awareness among consumers regarding the health and environmental implications of formaldehyde emissions, noting that many are willing to pay a premium for products with low or zero formaldehyde emissions. Her presentation reviewed various emerging alternatives to conventional synthetic resins, including the use of sustainable biomaterials as partial substitutes for synthetic polymers as well as the development of fully bio-based adhesive systems without any formaldehyde in the resin system. Promising bio-based formulations incorporating cardanol, lignin, and tannin were discussed, demonstrating their potential to enhance resource efficiency while meeting the performance requirements of plywood and other wood-based panel products.

A major highlight of the presentation was the progress of the project on the industrial upgradation and demonstration of soya-based phenolic/amino adhesive systems for the manufacture of BWR and MR grade plywood. The project, being undertaken by IWST with the support of FIPPI members,

aims to facilitate the commercial adoption of sustainable bio-based adhesive technologies by validating their performance under actual industrial manufacturing conditions.

Dr. Mamatha presented the findings from industrial trials and validation studies conducted by the IWST team at the manufacturing facilities of M/s. Greenply Industries Limited in Kolkata and M/s. Duroply Industries Limited in Rajkot. The trials demonstrated that the soya-based adhesive systems could be seamlessly integrated into existing manufacturing processes without requiring any modifications to production methodology or compromising the quality and performance of the finished plywood. The studies also indicated improved glue efficiency, with nearly 15% lower adhesive consumption per board, the ability to process veneers with comparatively higher moisture content, and compliance with the prescribed performance.

Post Dr. Mamtha presentation, representatives from M/s. Greenply Industries expressed their privilege in being the first company where industrial trials were conducted and noted that the outcomes had improved significantly during the second phase of validation, reaffirming the technology's commercial potential.

Representative from M/s. Duroply Industries also appreciated the efforts of the IWST team in successfully demonstrating the technology at their Rajkot manufacturing facility and observed that the trial results were highly encouraging.

Dr. Mamatha informed the participants that similar industrial trials are being planned at Century Plyboards (India) Limited, Kolkata, and Greenpanel Industries Limited, Rudrapur, with discussions currently underway. She further noted that while the technology has begun finding acceptance in the plywood segment, its application in the MDF and particle board sectors remains at the research and

development stage.

Concluding her presentation, Dr. Mamatha expressed her gratitude to Dr. M. P. Singh for his guidance and support in initiating the project.

Dr. C. N. Pandey commended IWST for developing and demonstrating this technology at a time when the industry is actively seeking sustainable alternatives to conventional resin systems.



Industrial Trial by IWST at M/s Duroply Industries Ltd.



Industrial Trial by IWST at M/s Greenply Industries Ltd.

5. Technical Session 2

Presenter: Shri H. Vaidyanathan, Founder, PlyQi™,

Shri H. Vaidyanathan, shared valuable industry insights on the commercial implementation of Non-Urea Resin (NUR) technologies for plywood manufacturing. He highlighted the strategic importance of transitioning to NUR technologies, noting that their widespread adoption could significantly reduce India's dependence on imported urea and methanol while supporting the industry's sustainability goals.

Shri Vaidyanathan presented a range of non-urea resin formulations, including MF-Bio and PF-Bio systems, developed for the manufacture of Moisture Resistant (MR), Boiling Water Resistant (BWR), and Boiling Waterproof (BWP) grade plywood. He discussed the manufacturing requirements, operational considerations, and commercial viability of these formulations, emphasising their compatibility with existing production processes. He informed the participants that four different NUR formulations are currently being utilised across manufacturing facilities in different parts of the country.

Highlighting recent technological advancements, he introduced the latest PF-based formulations based on the first ever acrylo-silanol Nano Gel technology developed by PlyQi™. The presentation also explored the potential application of these technologies in the manufacture of particle board and MDF, while underscoring the industry's gradual transition towards No Added Formaldehyde (NAF) products in response to evolving environmental regulations and growing market demand for low-emission wood-based panels.

6. Concluding remarks:

The interactive discussions that followed the technical presentations witnessed active participation from industry representatives, who unanimously recommended that both the technologies presented during the workshop should be validated across MSME plywood manufacturing units in different regions of the country. Such demonstrations, they observed, would strengthen industry confidence and facilitate the wider adoption of urea-free resin technologies.

Dr. M. P. Singh, Director General, FIPPI, emphasised the need to extend industrial validation beyond large manufacturers and proposed launching the next phase of trials in collaboration with MSME plywood units. He particularly encouraged manufacturers from Yamuna Nagar and UP to take the lead in conducting industrial trials and adopting sustainable urea-free resin technologies, thereby creating successful demonstration models for the rest of the industry.

Dr. Singh further highlighted the importance of scaling up the technologies presented by Shri H. Vaidyanathan and called upon a larger number of manufacturers to embrace these innovations over the next two years. Outlining a phased strategy for technology dissemination, he emphasised the need to demonstrate the successful adoption of these technologies initially in a limited number of industries, followed by wider implementation across 30 industries followed by 300 in the next phase and eventually covering 3000 manufacturing units all across the country. He also suggested that FIPPI and ICFRE-IWST jointly organise regular training programmes, industrial demonstrations, and capacity-building initiatives to accelerate technology transfer across the sector. Requesting Dr. Shakti Singh Chauhan to spearhead these efforts, he further proposed exploring the signing of a Memorandum of Understanding (MoU) between IWST and PlyQi to strengthen collaborative research and facilitate the commercial deployment of innovative resin technologies.

The workshop concluded with a formal vote of thanks by Dr. Shakti Singh Chauhan, reaffirming the shared commitment of ICFRE-IWST and FIPPI toward advancing collaborative research, industrial validation, and environmentally responsible manufacturing practices to reinforce the global competitiveness of India's wood panel industry. □



FIPPI Participates in Navbharat Times Conclave – Uttarakhand Samvad 2026



Dr. M.P. Singh, Director General, FIPPI, was invited as a distinguished panelist and speaker at the Navbharat Times Conclave – Uttarakhand Samvad 2026, held in Dehradun on 13th April 2026. Organized by The Times Group, the conclave marked four years of the Uttarakhand Government and celebrated 25 years of Uttarakhand's statehood. The event brought together policymakers, industry leaders, academicians, and experts to deliberate on the state's development journey and future growth opportunities.

The discussions focused on key sectors, including education, industrial and infrastructure development, tourism, the wellness economy, cultural heritage, and environmental sustainability. Representing FIPPI, Dr. M.P. Singh shared his perspectives on the pivotal role of agroforestry in promoting sustainable development, strengthening rural livelihoods, enhancing green cover, and supporting the growth of the wood-based industry. He emphasized the importance of integrating agroforestry into the state's development strategy to create long-term environmental and economic benefits.



FIPPI's participation in the conclave underscored the growing recognition of agroforestry as an important pillar of sustainable development. The discussions highlighted the need for closer collaboration between government, industry, and research institutions to unlock the sector's full potential for environmental conservation, rural livelihoods, and economic growth. □

FIPPI Delegation Visit to XYLEXPO 2026

Strengthening India-Italy Collaboration in Woodworking Technologies

XYLEXPO: A Global Platform for Woodworking Innovation

The 29th edition of XYLEXPO, one of the world's premier exhibitions for woodworking technologies and furniture manufacturing machinery was held at Fiera Milano-Rho, Milan, Italy, from 9–12 June 2026. The event showcased state-of-the-art technologies covering the entire woodworking value chain, including panel processing, solid wood machining, surface finishing, digital manufacturing, robotics, automation, sustainable production systems, and Industry 4.0 solutions. The exhibition brought together machinery manufacturers, technology providers, and industry professionals from across the world, creating a vibrant platform for business development and knowledge exchange.

For the 2026 edition, XYLEXPO was integrated into the newly launched MaTec industrial platform alongside PLAST (plastics and rubber technologies) and Composites Future, highlighting the growing convergence of advanced manufacturing technologies and multi-material solutions across industries. This integrated format enabled visitors to explore innovations extending beyond the traditional woodworking sector and encouraged cross-industry collaboration.

Strengthening India-Italy Industry Collaboration

A delegation representing 10 leading Indian plywood and furniture manufacturing companies visited XYLEXPO 2026 in Milan, Italy. The Federation of Indian Plywood and Panel Industry (FIPPI) was an integral part of the delegation, represented by 4 members. The visit was organized with the support of the Italian Trade Agency (ITA), the Government agency dedicated to promoting Italian companies internationally and strengthening business partnerships across global markets. The Indian delegation included the following representatives:

1. Dr. M.P. Singh, FIPPI
2. Ankush Gupta, Greenply Industries
3. Akhilesh Chitlangia, Duroply Industries Limited
4. Srishti Singh, Sylvan Plyboard India Limited
5. Nitin Shivajirao Nalavade, Nitshaw Wood Panel & Surface
6. Navaneeth Mysamy, Gishnu Gears (P) Ltd.
7. Siddharth Sethia, Sethia Handicrafts Pvt. Ltd.
8. Udit Goyal, Popcorn Furniture and Lifestyle Pvt. Ltd.
9. Prashant Jain, Parin Enterprises Ltd.
10. Vikas Arupula, Elegant Products Pvt. Ltd.

The delegation participated in business meetings, technology demonstrations, networking sessions, and focused B2B interactions with leading Italian manufacturers of woodworking machinery and automation solutions. The visit provided valuable exposure to cutting-edge technologies and advanced production systems, while strengthening India-Italy industry ties and creating opportunities for



technology transfer, modernization, and strategic business partnerships.

A key highlight of the visit was the meeting with Ing. Dario A. Corbetta, Director, Xylexpo, where discussions focused on the immense growth potential of the Indian woodworking sector and opportunities for collaboration between Italian machinery manufacturers and the Indian woodworking industry. The delegation highlighted India's transition towards advanced woodworking, supported by a rapidly growing base of skilled manpower and a favourable investment ecosystem. Italian companies were encouraged to explore partnerships, technology transfer, and investments in India, with strong Government support for manufacturing and industrial growth, that would further contribute to the continued modernization and global competitiveness of the Indian woodworking industry.

Looking Ahead

The visit to XYLEXPO 2026 offered valuable insights into emerging global trends in woodworking technologies, digital manufacturing, automation, and sustainable production practices. Such international engagements play an important role in supporting the modernization of India's plywood and panel industry while strengthening partnerships with global technology leaders. □



Amulya Mica wins Prestigious “Emerging Premium Laminate Brand of the Year 2026” Award at ET NOW Business Conclave & Awards 2026, Ahmedabad on 16th June 2026



We are proud to announce that Amulyamica Industries Pvt. Ltd., popularly known as “Amulya Mica,” has been honoured with the prestigious “Emerging Premium Laminate Brand of the Year 2026” award at the ET NOW Business Conclave & Awards 2026 – Gujarat Edition, held on 16th June 2026 at Hyatt Hotel, Ahmedabad, organized by ET NOW Network.

The award was received on behalf of the company by Mr. Sunil Thakore, Vice President – Export, and was presented by Mr. Arjun Modhwadia, Hon’ble Minister of Forest & Environment, Climate Change, Science & Technology, Government of Gujarat, India.

The ET NOW Business Conclave & Awards 2026 – Gujarat Edition served as an important platform to discuss critical themes surrounding Gujarat’s Renewable Energy Revolution, including Green Hydrogen, Biofuel, Solar Energy, and the challenge of balancing industrial growth with environmental sustainability. The conclave witnessed the participation of distinguished Government Ministers, Corporate Leaders, and CSR professionals, who engaged in insightful panel discussions on the future of sustainable industrial

development. The event recognized and celebrated some of India’s most influential leaders and brands that are shaping the next decade across diverse sectors, with renowned organizations such as Gujarat State Fertilizers & Chemicals Ltd. (GSFC) also being honoured at the prestigious gathering.

Expressing his happiness on this remarkable achievement, Mr. Rakesh Agarwal, Managing Director of Amulya Mica, described the recognition as another significant milestone in the company’s growth journey and a strong validation of the brand’s premium positioning in the laminate industry.

Mr. Agarwal also extended his heartfelt gratitude to the company’s dedicated employees, business associates, channel partners, friends, family members, and valued customers for their continued trust and unwavering support, which has played a vital role in the successful journey of the Amulya Group.

This achievement further strengthens Amulya Mica’s commitment to excellence and reinforces its position as one of India’s fast-emerging premium laminate brands in the decorative surfacing industry. □

FIPPI Showcases India's Wood Panel Industry at Bharat Buildcon 2026

The Federation of Indian Plywood and Panel Industry (FIPPI) marked a significant presence at Bharat Buildcon 2026, held from 18–21 June 2026 at Yashobhoomi Convention Centre, New Delhi. As one of India's premier exhibitions for the building materials, construction, and infrastructure sectors, the event brought together policymakers, manufacturers, architects, designers, builders, technology providers, traders, and international buyers on a common platform. Through its dedicated pavilion, FIPPI showcased the technological capabilities, sustainability initiatives, and growing global competitiveness of India's plywood and wood panel industry while reinforcing the Federation's continued commitment to policy advocacy, industry development, and export promotion.

A Grand Beginning: Inauguration of Bharat Buildcon



Bharat Buildcon 2026 commenced with a grand inaugural ceremony, officially inaugurated by Hon'ble Shri Jitin Prasada Ji, Hon'ble Union Minister of State for Commerce & Industry, along with Shri Manohar Lal Khattar, Hon'ble Union Minister for Housing and Urban Affairs and Minister of Power, Government of India, marking the beginning of four days dedicated to business networking, technology showcase, knowledge exchange, and policy dialogue. The inauguration reflected the Government's strong commitment to promoting sustainable industrial growth, strengthening India's manufacturing ecosystem, and accelerating the country's infrastructure development through innovation and collaboration.



Inauguration of FIPPI's Pavilion

The FIPPI Pavilion was formally inaugurated by Dr. M.P. Singh in the presence of Shri J.K. Jain, Senior Sustainability Advisor, FIPPI; Shri Jagdish Ahuja, Member, Board of Directors, Indian Laminates Manufacturers Association (ILMA); Dr. Richa Bansal, Assistant Director, FIPPI; and Ms. Khushboo Modi, Coordination Manager, ILMA.

The pavilion served as a dynamic platform to showcase the growth of the Indian plywood and panel industry while facilitating interaction among industry leaders, government officials, business delegates, and international stakeholders.



Meeting with Shri Amit Kumar, Joint Secretary, Department of Commerce, Government of India

FIPPI was honoured to welcome Shri Amit Kumar, Joint Secretary, Department of Commerce, Government of India, to the FIPPI Pavilion during Bharat Buildcon 2026. During his visit, he interacted with representatives of member companies including Northern Plywood Products, Greenpanel Industries, and Bhutan Tuff, gaining first-hand insights into the industry's manufacturing capabilities, technological advancements, and contribution to India's construction ecosystem.





The interaction provided an excellent opportunity to showcase the strength and potential of India's plywood and panel industry. His encouraging engagement with industry representatives reinforced the importance of continued Government-industry collaboration in fostering innovation, enhancing global competitiveness, and building a sustainable and future-ready wood products sector.

Expanding India's Global Market Reach: Meeting with International buyers

A meeting for was organized specifically for plywood and laminate manufacturers (FIPPI and ILMA members) with the international buyers from various countries such as Australia, Russia, Korea, etc., to explore business opportunities. These interactions facilitated meaningful discussions on product quality, sustainability, regulatory compliance, and emerging



market requirements, creating valuable opportunities for export promotion and long-term business partnerships.

These interactions further reinforced India's position as a supplier of high-quality wood-based products and opened new avenues for expanding exports in global markets.

FIPPI Pavilion: A Dynamic Platform for Industry Networking

Throughout the four-day exhibition, the FIPPI Pavilion witnessed an impressive footfall where manufacturers, architects, builders, consultants, traders, policymakers, and other industry professionals interacted with the representatives of FIPPI.

The Pavilion also welcomed distinguished delegates from Russia and Poland, providing valuable opportunities to exchange perspectives on international trade, technological cooperation, and future business partnerships.

The overwhelming response reflected the growing recognition of India's plywood and panel industry as an important contributor to sustainable construction and modern infrastructure development.



Meeting with MoSBuild Team



Meeting with the delegation from Poland-India Chamber of Cooperation



Ganesh Plywood Industries, Lakhimpur, UP



Bharat Cluster Ventures Pvt. Ltd.



FIPPI and ILMA Members



Masami Shimada, Nissan Chemical Group, Haryana



Meeting with CAPEXIL



The FIPPI leadership visited the exhibition stalls of member companies, appreciating their continued commitment to product innovation, advanced manufacturing technologies, quality assurance, and sustainable production practices.

The visits highlighted the latest developments in plywood, decorative laminates, engineered wood panels, and allied products, while fostering greater collaboration, knowledge sharing, and technological exchange within the industry.



Expanding the FIPPI Network

Bharat Buildcon 2026 also served as an effective platform for strengthening FIPPI's industry outreach. Representatives from several companies interacted with the Federation to learn about its policy advocacy, technical support initiatives, sustainability programmes, standards development activities, and industry representation.

The overwhelming response reaffirmed FIPPI's position as the leading voice of India's plywood and panel industry and reflected the increasing value that businesses associate with membership in the Federation.



AK Lumbers Ltd./North Avenue, Delhi

Looking Ahead

FIPPI's successful participation at Bharat Buildcon 2026 further strengthened its engagement with industry, Government, and international stakeholders. The exhibition provided an excellent platform to showcase the capabilities of India's wood-based panel industry while advancing discussions on innovation, sustainability, exports, quality, and policy development.

Through continued policy advocacy, strategic partnerships, and industry collaboration, FIPPI remains committed to building a globally competitive, sustainable, and future-ready plywood and panel industry that contributes meaningfully to Atmanirbhar Bharat and India's vision of becoming a leading global manufacturing and export hub. □



DRIVING POLICY ADVOCACY & INSTITUTIONAL CHANGE

FIPPI Urges Reconstitution of Development Council for the plywood and panel industry under the Industries (Development & Regulation) Act, 1951.



A delegation from FIPPI met the Hon'ble Commerce and Industry Minister, Shri Piyush Goyal on 10th July 2025 and submitted a formal representation seeking the reconstitution of the Development Council for Plywood and other Panel Products Industry

FIPPI continues to play 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.

There is a need for 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).

The proposed Development Council is envisioned as a strategic platform to:

- Facilitate inter-ministerial coordination between MOEF&CC, Ministry of Agriculture, and DPIIT, integrating timber and agroforestry policies under a common platform.
- Address persistent challenges related to raw material availability.
- Support the implementation and monitoring of QCOs, ensuring industry-wide compliance and quality assurance.
- Promote ease of doing business for plywood and panel industry.
- Promote innovation, product development, and technology adoption.
- Strengthen workforce skilling and employment generation.
- Enhance export competitiveness of Indian plywood and panel products.

FIPPI strongly believes that a dedicated Development Council will provide long-term policy stability and structured industry-government engagement for the sector.



Plywood / Wood Industry Investors Visit to Lucknow (22 - 23 June 2026)

Plywood Industry participated in Invest UP Meet in Lucknow to Accelerate Investment and Agroforestry-Led Growth

In a significant initiative to explore investment opportunities in Uttar Pradesh's rapidly expanding industrial ecosystem, Invest UP organised a high-level investment interaction in Lucknow on 22 June 2026, bringing together nearly 100 plywood industry leaders and prospective investors from Punjab, Haryana, Delhi and West Bengal.

The interactive session was chaired by Shri Deepak Kumar, Infrastructure & Industrial Development Commissioner (IIDC), Government of Uttar Pradesh, in the presence of the CEO and Additional CEO of Invest UP, along with senior officials of the Government of Uttar Pradesh.

The meeting witnessed enthusiastic participation from leading manufacturers and entrepreneurs, reflecting the growing interest of the plywood and wood-based panel industry in expanding operations within Uttar Pradesh. Participants highlighted the significant competitive advantage of the state arising from the abundant availability of raw material through its well-established agroforestry network, making Uttar Pradesh an attractive destination for establishing new manufacturing facilities and future investments.

During the meeting, Shri Deepak Kumar highlighted Uttar Pradesh's investor-friendly ecosystem, supported by progressive Ease of Doing Business (EoDB) reforms, world-class infrastructure, and industry-centric policies. He reaffirmed the Government's commitment to introducing a dedicated Agroforestry-Based Policy for the promotion of the plywood and wood-based industry at the earliest. The proposed policy aims to strengthen raw material availability, encourage sustainable industrial development, and enhance the state's competitiveness as a preferred investment destination.

A key outcome of the meeting was the decision to formulate a new Agroforestry-Based Policy specifically to promote the plywood industry in Uttar Pradesh. It was also agreed that a sectoral committee would be constituted to facilitate continuous dialogue, address sector-specific issues, and provide guidance for the sustainable growth of the industry. The meeting served as a highly productive platform for interaction between the Invest UP team, senior leadership of the Government of Uttar Pradesh, and key stakeholders from the plywood and wood-based industry. FIPPI welcomed the state's proactive approach towards creating an enabling ecosystem for the sector and appreciated the Government's commitment to policy reforms that will further strengthen the agroforestry value chain and promote industrial growth.





Visit of Industry Officials and Investors to Greenply Industries Limited, Sandila Plant- 23 June 2026

Greenply Industries hosted a visit for investors and plywood industry representatives at its wholly owned subsidiary, Greenply Sandila Private Limited, on June 23, 2026. The visit provided manufacturers an opportunity to understand the new technology of plywood manufacturing and witness the company's latest innovation in the wood panel industry.



Plywood & Panel Industry Conclave-23 June 2026

The plywood and Panel Industry Conclave was successfully organized by the Wood Based Udyog Association and Northern India Plywood Manufacturers Association in



Lucknow on 23 June 2026. The conclave brought together plywood and wood-based panel manufacturers, technology providers, and industry associations from Uttar Pradesh, Punjab, Haryana, and Uttarakhand. Discussions focused on sustainable growth, technological innovation, policy reforms, investment opportunities, and the future direction of the industry.



Shri Rajesh Mittal, President FIPPI & CMD Greenply Industries Ltd., in his presidential address observed that the Indian plywood and wood-based panel industry is entering a new phase of sustained growth, driven by increasing domestic demand, technological advancement, and a greater emphasis on sustainability. He stressed the need for the industry to accelerate the transition towards urea-free resin systems and bio-based adhesive technologies to meet evolving environmental standards and market expectations.

He also highlighted the Government's continued efforts to promote Ease of Doing Business through progressive policy reforms and emphasized the need for the industry to focus on fresh investments and the establishment of new manufacturing facilities. In this context, FIPPI has submitted policy reform proposals to various Ministries, including MoEF&CC and NITI Aayog, seeking regulatory reforms to facilitate the growth of the plywood and wood-based panel sector. FIPPI has also urged the Principal Chief Conservators of Forests (HoFFs) of all States to incorporate the amended MoEF&CC guidelines on wood-based industries into State-level regulations, thereby enabling the establishment of new

manufacturing units and creating a more conducive business environment.



This was followed by an interactive session in which industry leaders, manufacturers, and stakeholders engaged in meaningful discussions on key issues affecting the plywood and wood-based panel sector. The discussions underscored the importance of progressive policy reforms, sustainable raw material security through agroforestry, technological advancement, and ease of doing business in driving the next phase of industry growth. With increasing investor confidence and proactive government support, the conclave reaffirmed the sector's readiness to expand manufacturing capacity, promote sustainable development, and contribute significantly to employment generation and the nation's economic growth. □



Vision

To empower the growth, sustainability, and global competitiveness of the Indian Plywood and Panel Industry through collaboration, innovation, stewardship, and advocacy, enabling a stronger future for members while promoting excellence, responsibility, and leadership within national and international markets.

Mission

To establish FIPPI as a robust organization uniting firms, companies, associations, and individuals in the Plywood and Panel industry, nationally and internationally, advancing their interests, fostering cooperation, and advocating supportive policies that ensure growth, quality, competitiveness, sustainability, stewardship, and innovation.





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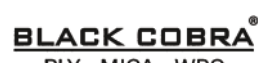
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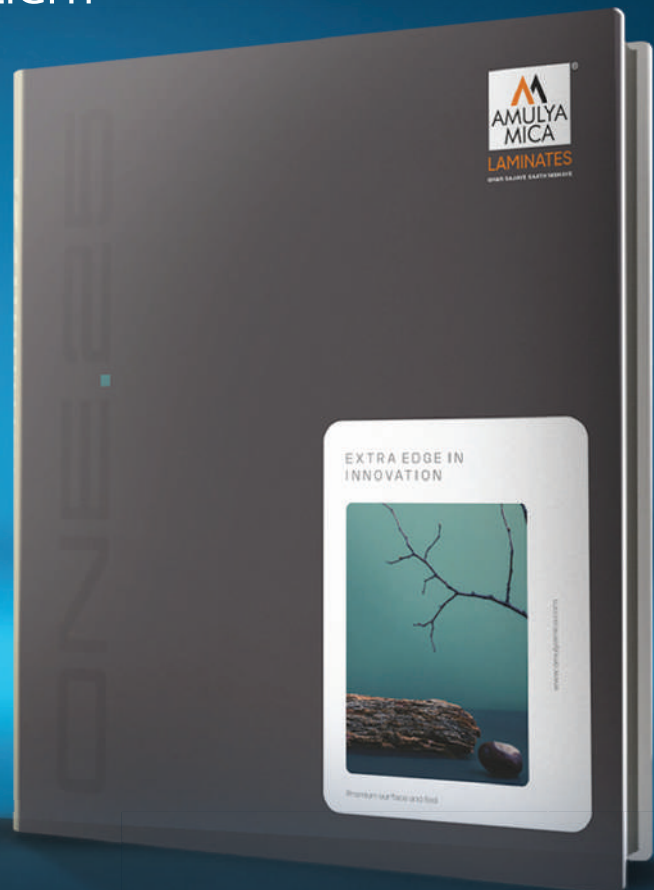


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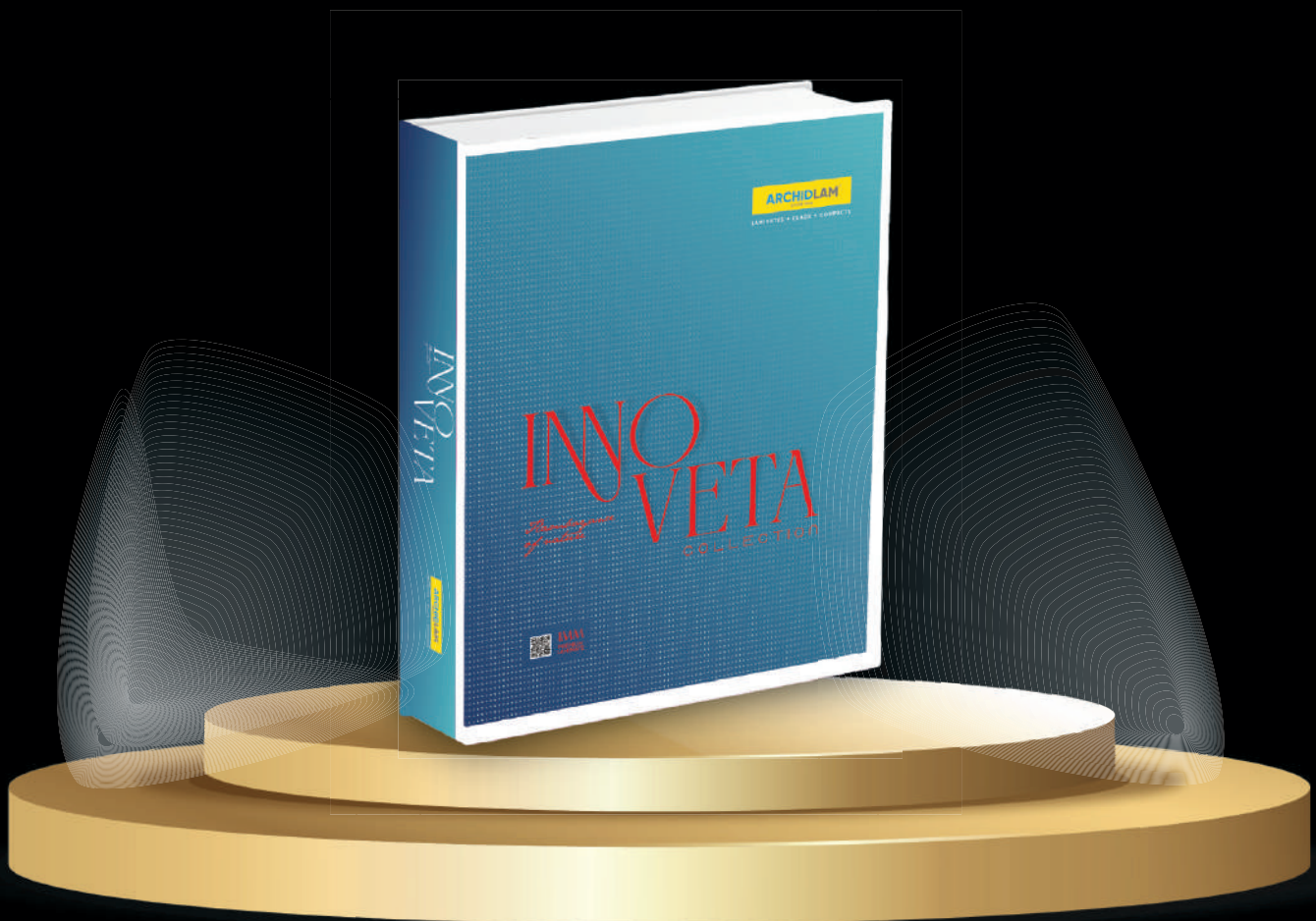
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