



We focus on products which deliver productivity and cost competitiveness for our customers.

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What is the market size, demand and potential for attachments from infra & construction, agriculture and forestry and demolition?

Specialised attachments mounted on construction equipment has been gaining fast acceptance in the Indian market. These special and customized attachments provide flexibility to the users helping them switch between varied jobs and applications that they need to execute.

These attachments help customers in maximum utilisation of their machines by deploying them in multiple applications. The market size of the attachment Industry is estimated to be around Rs 750-1000 crore this year and is projected to grow at 18-20% on yearly basis in the medium term. The highest selling attachment is the rock-breaker, which can be attached to excavators and backhoe loaders with different capacities.

Currently, the demand for attachments, comes from the infra and construction segments. The investments that have been planned in this segment in the coming years will continue to drive the growth of attachments sector. Mining is another segment where we foresee growth in demand for attachments. With lot of restrictions on mining operations which are located near populous areas, special attachments are gaining acceptance as alternatives to traditional mining practices. In the agriculture segment, there are many attachments that are used along with tractors. There is a growing adoption of these attachments as the agricultural practices change hands from the previous generation to the next. This opens yet another opportunity for attachments along with machines in the backhoe loader and mini excavator segment. Building demolition industry currently is a new concept in the Indian market and the requirements are limited to a few customers who specialize in this.

In the construction & infra sector, what is the acceptance level from different end-user segments? What do you think are the major challenges ?

All major projects are time-bound, and customers will have to adopt mechanisation in order to meet cost and time. The scarcity of unskilled manpower in some states has been one of the main reasons for increased acceptance for attachment usage. Going forward, some of the new government policies like vehicle scrapping, waste to energy, ship breaking etc. will not only call for specialized attachments but will also become a mandatory requirement.

In construction & infra, majority of the customers prefer

low cost attachment models which can be detrimental to the base machines. Only about 20-30% of the consumers are quality and productivity conscious and opt for value-for-money products. As this market matures, we foresee migration of customers from low cost to premium products.

On the other hand, customers in the mining segment prefer premium products where productivity and life cycle cost of the product are major attributes in the buying decision. We, at Tata Hitachi, focus on products which deliver productivity and cost competitiveness for our customers.

One of the major challenges we face in the expanding attachment sales segment is financing of these attachments. These attachments need financing. So, when the customer opts for these attachments along with new machines sales financing is comparatively easy. But it becomes a major challenge to seek finance in the case of new attachments on old machines. Lack of structured financing options for such type of procurement often forces the customers to opt for low cost options.



How does the rental space look like? What are your initiatives in this space?

In India, rental market is at a nascent stage when compared to European & US markets. However, the scenario is likely to change in near future. We might see rental companies offering these specialized attachments as part of their portfolio. The rental option is especially attractive for customers who are looking for short term projects or for niche applications where they need not go for capital investment but opt for the rental option instead.

In line with Tata Hitachi's philosophy of providing reliable solutions to our customers, we have our in-house rental division through which we offer rental options to our customers not only for machines but also for machines coupled with attachments. We have received very positive feedback from these installations, and we are expecting more customers to go for rental options in coming years.

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