

MINING IN INDIA 2020

Analysis, Trends, Projects and Opportunities

The report will help you to:

- ❖ Identify key growth trends in the mining sector
- ❖ Analyse the impact of Mineral Laws (Amendment) Ordinance 2020 as well as other key policy developments
- ❖ Analyse demand, supply, trading and pricing scenario for key minerals
- ❖ Gain the projections for key minerals till 2024-25
- ❖ Create strategies based on current exploration status and future requirements
- ❖ Get a comprehensive view of upcoming projects and associated market opportunities
- ❖ Understand the market presence of leading players in the sector

MINING EQUIPMENT MARKET PROJECTIONS IN INDIA 2020

Analysis, Developments, Outlook and Projections

The report will help you to:

- ❖ Analyse the size and growth and market trends in the mining equipment market
- ❖ Gain insights through the projections of key equipment (till 2024-25)
- ❖ Understand the future potential and demand for new equipment and technologies
- ❖ Assess the impact of recent policy developments on the equipment market
- ❖ Track the upcoming projects and emerging opportunities for equipment manufacturers
- ❖ Support business planning and strategies

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The domestic mining sector, which currently contributes about 3 per cent to the economy's gross domestic product, is expected to witness interesting times ahead. In the past few months, the mining sector has witnessed a number of regulatory changes and policy amendments, aimed at attracting greater investments as well as creating a more efficient mineral market. The recent approval Mineral Laws (Amendment) Ordinance 2020 to amend the Coal Mines (Special Provisions) Act, 2015 is expected to open up coal mining by any company present in sectors other than steel and power as well as has done away with captive end-use criteria. It will also help in obtaining faster clearances for projects and help access more sophisticated technology for underground mining. Meanwhile steps are also being taken towards increasing exploration budgets, curb illegal mining and to spearhead the auctions for iron ore and other minerals before the expiry of current mining leases. Going forward, these changes are expected to provide plenty of opportunities for exploration companies as well as equipment and technology providers.

Executive Summary

SECTION I: SECTOR TRENDS, POLICY INITIATIVES, OUTLOOK AND PROJECTIONS

1. Sector Overview and Key Trends

- ❖ Mineral Reserves
- ❖ Trends in Production and Consumption
- ❖ Trends in Imports and Exports
- ❖ Mineral Trade Deficit
- ❖ FDI in Mining
- ❖ National Mineral Policy, 2019: Impact on the Sector
- ❖ Union Budget 2020-21
- ❖ Disinvestment Targets
- ❖ Investment Requirements
- ❖ Key Risks and Challenges
- ❖ Sector Outlook

2. Mineral Laws (Amendment) Ordinance 2020: Features and Likely impact

- ❖ Need and Objective
- ❖ Key Changes Related to
 - Removal of Restriction on End-Use of Coal
 - Eligibility for Auction of Coal and Lignite Blocks
 - Composite Licence for Prospecting and Mining
 - Non-Exclusive Reconnaissance Permit Holders to Get Other Licences
 - Transfer of Statutory Clearances to New Bidders
 - Reallocation after Termination of the Allocations
 - Prior Approval from the Central Government
- ❖ Impact on Coal Mining
- ❖ Impact on Other Minerals
- ❖ Expected Impact on the Industry (production, exploration, investments, FDI, etc.)
- ❖ Industry Viewpoint and Recommendations

3. Exploration Status: Progress and Future Requirements

- ❖ Current Exploration Spend
- ❖ Stripping Ratios
- ❖ Capital Expenditure on Exploration
- ❖ Experience with Private Players
- ❖ Foreign Participation: Experience, Opportunity Areas and Limiting Factors
- ❖ Potential Foreign Country Collaborations
- ❖ Key Issues and Challenges

4. Outlook and Key Projections (2024-25)

- ❖ Growth Drivers
- ❖ Demand and Supply Projections of Key Minerals
 - Coal
 - Iron Ore

- Lignite
- Limestone
- Bauxite
- Copper
- Battery Minerals (cobalt, nickel, etc.)
- Etc.

- ❖ Policy Outlook and Proposed Policy Initiatives
- ❖ Mining Lease Expiry in March 2020: Expected Impact
- ❖ Exploration Targets (Next 3-4 years)
- ❖ Expected Constraints

5. Project Pipeline and Market Opportunities

- ❖ Overall Pipeline
- ❖ Top Upcoming Projects
- ❖ Analysis
 - By Mineral
 - By Stage
 - By State
 - By Ownership
- ❖ Market Opportunities for Stakeholders
 - Equipment Providers
 - Technology Suppliers
 - Contract Miners
 - Consultants
 - Others

6. Update on Auctions

- ❖ Overall Analysis
 - Total Blocks Auctioned (2015-16 to 2019-20)
 - Progress under Key Mines
 - Mineral-wise Analysis
 - Year-wise Analysis
 - State-wise Analysis
 - Purpose of Auction (ML or PL cum ML)
 - Statutory Payments (Royalty, DMF and NMET)
 - Key Bidders
- ❖ Blocks under Auction
- ❖ Key Issues and Challenges

7. MDO Experience and Outlook

- ❖ Experience So Far
- ❖ Key MDOs
- ❖ Issues and Concerns
- ❖ Solutions and Recommendations
- ❖ Upcoming Opportunities
- ❖ Future Outlook

SECTION II: COAL MINING: PROGRESS AND THE WAY FORWARD**9. Size and Growth**

- ❖ Coal Reserves
- ❖ Domestic Production
- ❖ Coal Imports
- ❖ Pricing Trends
- ❖ Recent Policy Changes: Likely Impact
- ❖ Demand Projections (till 2024-25)
- ❖ Supply Projections (till 2024-25)

10. Coal Mining Auctions Update

- ❖ Experience so Far
- ❖ E-auction Prices
- ❖ Recent Auctions
- ❖ Upcoming Auctions
- ❖ Key Concern Areas

11. Commercial Coal Mining: Expectations and Future Roadmap

- ❖ Recent Policy Developments: Proposed Impact
- ❖ Impact on Coal India Limited
- ❖ Commercial Coal Auction Plans for 2020-21
- ❖ Monetary Allocations for Block Exploration
- ❖ Key Issues and Challenges

SECTION III: ANALYSIS OF KEY MINERALS: MARKETPLACE AND FUTURE POTENTIAL**12. Iron Ore**

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Mineral Outlook and Projections (till 2024-25)

13. Lignite

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Mineral Outlook and Projections (till 2024-25)

14. Limestone

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Mineral Outlook and Projections (till 2024-25)

15. Bauxite

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Players

- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Mineral Outlook and Projections (till 2024-25)

16. Copper

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Mineral Outlook and Projections (till 2024-25)

17. Battery Minerals (Cobalt and Nickel)

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Update on KABIL
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Outlook and Projections (till 2024-25)

18. Rare Earth Minerals

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Outlook and Projections (till 2024-25)

19. Other Key Minerals (Dolomite, Quartz, Kaolin, Magnesite, Silica, etc.)

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Update on KABIL
- ❖ Key Mining Companies
- ❖ Investment Plans
- ❖ Upcoming Projects
- ❖ Outlook and Projections (till 2024-25)

SECTION IV: LEADING PLAYERS**20. Profiles of Key Mining Companies**

- ❖ Coal India Limited
- ❖ Singareni Collieries Company Limited
- ❖ Gujarat Mineral Development Corporation Limited
- ❖ NLC India Limited
- ❖ National Aluminium Company Limited
- ❖ Hindalco Industries Limited
- ❖ NMDC Limited
- ❖ Vedanta Resources
- ❖ Steel Authority of India Limited
- ❖ Tata Steel Limited
- ❖ Hindustan Copper Limited
- ❖ Hindustan Zinc Limited
- ❖ Other Key Players

Each company profile will cover business portfolio, production, sales, financial performance, investment plans and upcoming projects.

The mining equipment market is expected to witness a significant growth momentum over the next few years. The National Mineral Policy 2019 along with recent policy measures including the removal of restriction on end-use of coal and 100% FDI under the automatic route in coal mining and associated infrastructure etc., are expected to drive the demand for mining industry in general and mining equipment and technologies in particular. Meanwhile, mining companies' increasing efforts towards increasing production; ensuring safe, clean and sustainable operations; improving equipment utilisation will be other growth drivers. New concepts and technologies such as artificial intelligence, blockchain, machine learning, drones, robotics are also being explored.

Executive Summary

SECTION I: SEGMENT ANALYSIS AND GROWTH DRIVERS

1. Mining Sector Trends and Outlook

- ❖ Sector Size and Growth
- ❖ Key Trends and Developments
- ❖ Policy and Regulatory Developments
- ❖ Issues and Challenges
- ❖ Outlook and Projections (till 2024-25)

2. Equipment Market Size and Growth

- ❖ Key Equipment Used
- ❖ Current Market Size of Key Equipment
- ❖ Growth in the Past Five Years
- ❖ Equipment Productivity Levels
- ❖ Equipment Utilisation Levels
- ❖ Recent Developments Impacting the Equipment Market
- ❖ Key Players
- ❖ Issues and Challenges

3. Equipment Market Outlook and Projections (till 2024-25)

- ❖ Key Growth Drivers
- ❖ Impact of Mineral Law Ordinance 2020
- ❖ Equipment Procurement Plans of Mining Companies
- ❖ Mining Project Pipeline
- ❖ Equipment Outlook and Projections (till 2024-25)

4. Key Consuming Segments

- ❖ Coal
 - Segment Size and Growth
 - Equipment Application and Usage
 - Growth Drivers
 - Key Challenges
 - Projected Demand for Mining Equipment (till 2024-25)
- ❖ Key Non-Coal Minerals (Metallic and Non-metallic)
 - Segment Size and Growth
 - Equipment Application and Usage
 - Growth Drivers
 - Key Challenges
 - Projected Demand for Mining Equipment (till 2024-25)

5. Mining Techniques and Technology Trends

- ❖ Surface Mining
- ❖ Underground Mining
- ❖ Longwall Mining
- ❖ In-Pit Crushing and Conveying
- ❖ Current Areas of Technology Adoption (survey and exploration, mine planning and design, safety, sustainable and clean mining, etc.)
- ❖ Emerging Technologies (artificial intelligence, blockchain, internet of things, machine learning, drones, automation and robotics, etc.)
- ❖ Key Case Studies and Lessons

6. Leading Players

- ❖ Key Equipment Manufacturers
- ❖ Operations and Key Projects
- ❖ New Innovations
- ❖ Expansion Plans of Leading Players
- ❖ Mergers and Acquisitions
- ❖ Strategic Partnerships/Joint Ventures/Agreements

SECTION II: KEY EQUIPMENT ANALYSIS AND PROJECTIONS (TILL 2024-25)

7. Drilling, Excavation and Extraction Equipment

- ❖ Overview
- ❖ Recent Trends and Advancements
- ❖ Key Equipment Manufacturers
- ❖ Demand Drivers
- ❖ Projected Demand for Key Equipment (drills, hydraulic shovels, etc.)

8. Loading Equipment

- ❖ Overview
- ❖ Recent Trends and Advancements
- ❖ Key Equipment Manufacturers
- ❖ Growth Drivers
- ❖ Projected Demand for Key Equipment (excavators, draglines, loaders, etc.)

9. Haulage Equipment

- ❖ Overview
- ❖ Recent Trends and Advancements
- ❖ Key Equipment Manufacturers
- ❖ Growth Drivers
- ❖ Projected Demand for Key Equipment (dumpers and haul trucks, conveyer belts, etc.)

10. Crushing, Sizing and Screening Equipment

- ❖ Overview
- ❖ Recent Trends and Advancements
- ❖ Key Equipment Manufacturers
- ❖ Growth Drivers
- ❖ Projected Demand (till 2024-25)

11. Auxiliary Equipment

- ❖ Overview
- ❖ Recent Trends and Advancements
- ❖ Key Equipment Manufacturers
- ❖ Growth Drivers
- ❖ Projected Demand (till 2024-25)

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Mining in India 2020			
Site Licence (Single Location)	Rs 60,000	Rs 67,500	Rs 75,000
GST @ 18%	Rs 10,800	Rs 12,150	Rs 13,500
Total	<input type="checkbox"/> Rs 70,800	<input type="checkbox"/> Rs 79,650	<input type="checkbox"/> Rs 88,500
Enterprise Licence (Multiple Locations)			
Enterprise Licence (Multiple Locations)	Rs 1,08,000	Rs 121,500	Rs 1,35,000
GST @ 18%	Rs 19,440	Rs 21,870	Rs 24,300
Total	<input type="checkbox"/> Rs 1,27,440	<input type="checkbox"/> Rs 1,43,370	<input type="checkbox"/> Rs 1,59,300
Mining Equipment Market Projections in India 2020			
Site Licence (Single Location)	Rs 48,000	Rs 54,000	Rs 60,000
GST @ 18%	Rs 8,640	Rs 9,720	Rs 10,800
Total	<input type="checkbox"/> Rs 56,640	<input type="checkbox"/> Rs 63,720	<input type="checkbox"/> Rs 70,800
Enterprise Licence (Multiple Locations)			
Enterprise Licence (Multiple Locations)	Rs 72,000	Rs 81,000	Rs 90,000
GST @ 18%	Rs 12,960	Rs 14,580	Rs 16,200
Total	<input type="checkbox"/> Rs 84,960	<input type="checkbox"/> Rs 95,580	<input type="checkbox"/> Rs 106,200
Mining in India 2020 + Mining Equipment Market in India 2020 (Special Combo Price):			
Site Licence (Single Location)	Rs 88,000	Rs 99,000	Rs 110,000
GST @ 18%	Rs 15,840	Rs 17,820	Rs 19,800
Total	<input type="checkbox"/> Rs 103,840	<input type="checkbox"/> Rs 116,820	<input type="checkbox"/> Rs 129,800
Enterprise Licence (Multiple Locations)			
Enterprise Licence (Multiple Locations)	Rs 132,000	Rs 148,600	Rs 165,000
GST @ 18%	Rs 23,760	Rs 26,730	Rs 29,700
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