MINING IN INDIA 2019
Emerging Trends, Evolving Policy Framework, New Opportunities and Future Outlook

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India Infrastructure Research
## Executive Summary

### Section I: Market Trends, Opportunities and Outlook

1. **Industry Overview**
   - Current Market Size and Growth
   - India’s Role in the Global Mining Market
   - Mineral Reserves Position
   - Development of the Mineral and Mining Belt of India
   - Production Trend Analysis
   - Consumption Trend Analysis
   - Foreign Trade Analysis
   - FDI in the Mining Sector in India
   - International Collaborations in Mining
   - Key Risks and Challenges
   - Outlook and Projections

2. **Draft National Mineral Policy, 2018**
   - Overview
   - Key Policy Features
     - Prospecting and Exploration
     - Incentivising the Private Sector
     - Impact of the Mining Tenement System
     - Mining and Mineral Development Strategy
     - Mining Machinery and Mineral Beneficiation Equipment
     - Moving Towards Sustainable Mining
     - Benchmarking Taxation with International Norms
   - Planned Financial Support
   - Impact Analysis on the Mining Industry
   - Unaddressed Issues and Challenges

3. **Policy and Other Recent Developments**
   - Amendments to Mineral Auction Rules, 2015
   - Amendment to Offshore Areas Mineral (Development and Regulation) Act, 2002
   - Star Rating Scheme for Minor Minerals
   - Legalisation of Commercial Coal Mining
   - Update on Coal Mine Allocation
   - Update on Recent Mining Leases Granted
   - Key Projects Completed
   - Mergers/Acquisitions
   - Stressed Assets
   - Recent Bids in Auctions
   - Likely Impact of Policy Changes

4. **Project Pipeline and Market Opportunities**
   - Overall Project Pipeline
   - Pipeline Analysis Matrix
     - By Minerals
     - By Stage
     - By State
     - By Ownership
   - Market Opportunity For
     - MDOs
     - Equipment and Technology Providers

5. **Outlook and Projections (till 2024)**
   - Demand Projections of Key Minerals
   - Supply Projections of Key Minerals
   - Policy Outlook

6. **Exploration Segment Trends and Requirements**
   - Status of Exploration
     - Reserves
     - Production
     - R/P Ratio
     - Deeper Deposits and Higher Stripping Ratio
   - Capital Expenditure on Exploration
   - Current Drilling Levels
   - Evolving Mining Methods (Underground vs Opencast)
   - Future Investment Needs
   - Exploration Targets for 2019-20
   - Funding Options for Mining Companies
   - Emerging Business Models: Cluster Approach
   - Issues and Challenges

7. **Risks and Challenges**
   - Macroeconomic Factors
   - Challenges in Project Execution (Case Studies of Key Completed Projects)
   - Equipment and Technology Challenges
   - Status of Infrastructure Facilities
   - Health, Safety and Environmental Concerns
   - Geological Risks
   - Other Concerns

8. **MDO Experience**
   - Experience So Far
   - Issues and Challenges
   - Solutions and Recommendations
   - Opportunity Analysis
   - Future Outlook

9. **Mining Equipment and Technology**
   - Equipment-wise Market Size
   - Key Equipment Used
   - Industry Structure
   - Recent Developments
   - Procurement Plans of Mining Companies
   - Equipment and Technology Trends
   - Segment Overview
     - Drilling
     - Loading
     - Haulage
     - Crushing, Pulverising and Screening Equipment
     - Auxiliary and Support Equipment
   - Equipment Outlook and Projections (till 2024)

### SECTION II: FOCUS ON COAL MINING

10. **Size and Growth**
    - Existing and Balance Reserves
    - Coal Demand Analysis
    - Coal Supply Analysis
    - Demand-Supply Gap
    - Domestic Production Trends
    - Coal Import Trends
    - Policy Developments
    - Demand and Supply Projections (till 2024)
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