

Mining in India 2022

Sector Analysis, Projects, Opportunities and Forecasts

- ❖ Research Report
- ❖ Data-set (Excel)

This report will cover:

- ❖ Trends and developments in India's mining sector
- ❖ Analyses of key minerals in terms of production, demand, pricing etc.
- ❖ Detailed pipeline of upcoming mining projects (announced, awarded and under construction)
- ❖ Outlook and projections of key minerals
- ❖ Equipment market size and forecasts
- ❖ Opportunities for equipment and technology providers
- ❖ Profiles of key mining companies and their plans

India's mining industry forms a major part of the nation's economy, both in terms of its contribution to GDP and in supply of raw materials to industrial and infrastructure sector. The total value of mineral production (excluding atomic & fuel minerals) during 2020-21 has been estimated at Rs 1,299.50 billion. India is home to the fourth largest coal reserves in the world and also hosts significant sources of bauxite, diamonds, and titanium ore. Despite being a resource-rich country, the mining sector's contribution to national GDP stands at just about 2-3%, which reflects the huge untapped potential that the sector has to offer. The ongoing reforms in the mining segment are expected to pave way for increased private sector participation in mineral exploration. There is a visible pipeline of over 200 projects in announced/planning stage and the opening up of the coal sector to private players is expected to attract a huge capital investment going forward. There is thus significant opportunity for mine developers, technology and equipment providers over the next few years.

Executive Summary

- By State
- By Ownership

SECTION I: SECTOR ANALYSIS, PROJECTIONS, AND OUTLOOK

- ❖ Market Opportunities for:
 - MDOs and Contractors
 - Equipment Providers
 - Mine Design Consultants
 - Technology Providers

1. Sector Overview and Key Trends

- ❖ Historical Size and Growth
 - By Volume
 - By Value
- ❖ Key Sector Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Policy and Regulatory Developments
- ❖ Government Initiatives
- ❖ Impact of Covid on:
 - Projects
 - Commodity Prices
 - Production and Demand
 - Mining Companies
- ❖ Issues and Challenges
- ❖ Future Outlook

The detailed project pipeline will be provided in the dataset with parameters like location, current status, project type (greenfield/brownfield), capacity, implementing agency, cost (on a best effort basis), etc.

2. Project Pipeline and Market Opportunities (Till 2026-27)

- ❖ Overall Pipeline
- ❖ Top Upcoming Projects
- ❖ Pipeline Analysis
 - By Mineral
 - Coal
 - Iron ore
 - Lignite
 - Limestone
 - Etc.
 - By Stage of Development
 - Under-construction
 - Announced
 - Recently Awarded
 - By Type
 - Greenfield
 - Brownfield

3. Future Outlook and Key Projections (Till 2026-27)

- ❖ Growth Drivers
- ❖ Forecasts of Growth in the Next Five Years
- ❖ Demand Projections for Minerals
- ❖ Supply Projections of Key Minerals
- ❖ Investment Projections
- ❖ Upcoming Blocks for Auction

4. End-use Market Size and Growth (Till 2026-27)

- ❖ Power Generation
- ❖ Cement
- ❖ Steel
- ❖ Aluminum
- ❖ Infrastructure (Roads, railways, transmission lines, etc.)
- ❖ New and emerging segments (Battery energy storage system, electric vehicles, etc.)

5. Exploration and Investment Trends

- ❖ Current Exploration Area and Spending
- ❖ Recent Initiatives and Structural Reforms
- ❖ Foreign Participation and FDI Trends
- ❖ Recent Investments by Mining Companies
- ❖ Future Capex Plans of Mining Companies
- ❖ Partnerships and Joint Ventures
- ❖ Underground Mining Trends and Potential
- ❖ Issues and Challenges
- ❖ Future Exploration Target

6. Mineral Auction Update

- ❖ Summary of Auctions so Far
- ❖ Commercial Coal Mining
 - Auctions Conducted so Far
 - Bidding Response and Experience
 - Upcoming Auctions Plan for 2022
- ❖ Non-Coal Mineral Auctions
 - Year-wise and State-wise Analysis
 - Mineral-wise Analysis
 - Type of Licenses
 - Statutory Payments (Royalty, DMF and NMET)
 - Blocks in Pipeline for Auction
- ❖ Issues and Challenges
- ❖ Future Outlook

SECTION II: MINERAL ANALYSIS, MARKETPLACE AND PROJECTIONS**9. Coal**

- ❖ Coal Reserves
- ❖ Domestic Production
- ❖ Coal Imports and Sourcing Countries
- ❖ Pricing Trends
- ❖ Recent Policy Changes and Developments
- ❖ Upcoming Projects and their Status
- ❖ Demand Projections (till 2026-27)
- ❖ Supply Projections (till 2026-27)

10. Iron Ore

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Outlook and Projections (till 2026-27)

11. Lignite

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Outlook and Projections (till 2026-27)

12. Limestone

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Outlook and Projections (till 2026-27)

13. Bauxite

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Outlook and Projections (till 2026-27)

14. Copper

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Outlook and Projections (till 2026-27)

15. Lead and Zinc

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status
- ❖ Blocks on Auction
- ❖ Outlook and Projections (till 2026-27)

16. Battery Minerals

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Recent Developments
- ❖ Key Players
- ❖ Investment Plans
- ❖ Upcoming Projects and their Status

17. Other Key Minerals (Rare Earth Minerals, Magnesite, Dolomite, Quartz, Silica Sand, Kaolin)

- ❖ Reserves
- ❖ Production
- ❖ Exports and Imports
- ❖ Price Trends
- ❖ Key Mining Companies
- ❖ Outlook

SECTION III: EQUIPMENT MARKET SIZE AND FORECASTS**18. Market Size and Growth**

- ❖ Equipment Market Segmentation
 - Surface
 - Underground
 - Process Equipment
- ❖ Market Size of Key Equipment
- ❖ Growth in the Past Five Years
- ❖ Equipment Productivity Levels
- ❖ Equipment Utilization Levels
- ❖ Recent Developments
- ❖ Covid Impact Analysis
- ❖ Key Players
- ❖ Issues and Challenges

19. Outlook and Forecasts (Till 2026-27)

- ❖ Growth Drivers
- ❖ Constraining Factors
- ❖ Equipment Procurement Plans of Key Mining Companies
- ❖ Projections of Key Equipment
 - Drills
 - Excavators
 - Haulage Equipment
 - Crushing, Pulverising and Screening Equipment
 - Mineral Process Equipment
 - Auxiliary and Support Equipment
- ❖ Top Future Trends
- ❖ Market Opportunities

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
- ❖ KIOCL Limited
- ❖ NMDC Limited
- ❖ Vedanta Limited
- ❖ Steel Authority of India Limited
- ❖ Tata Steel Limited
- ❖ Hindustan Copper Limited
- ❖ Hindustan Zinc Limited
- ❖ Others

Each profile will Cover data and information on:

- Operational Performance
- Project Portfolio/Key Projects
- Financial Performance
- Expansion Plans
- Etc.

21. Profiles of Key MDOs

- ❖ Adani Enterprises
- ❖ NCC-BGR joint venture
- ❖ Lanco Infratech Limited
- ❖ Brahmaputra Group
- ❖ EMIL
- ❖ Thriveni Earthmovers
- ❖ SMASL
- ❖ JMS MSPL
- ❖ Montecarlo Mining Limited
- ❖ DilipBuildcon Limited
- ❖ Aurobindo Reality and Infrastructure Private Limited
- ❖ Fairmine Carbons Private Limited
- ❖ Stratatech Mineral Resources Private Limited
- ❖ Chowgule and Company Private Limited
- ❖ Others

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