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Contact details:

Raktima Majumdar

Senior Manager-Information Products
India Infrastructure Publishing Pvt. Ltd.,
B-17, Qutab Institutional Area, New Delhi - 110 016, India
Mobile: **+91 8826127521**
Email: majumdar.raktima@indiainfrastructure.com

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Mining in India 2022

Sector Analysis, Projects, Opportunities and Forecasts

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

This insightful report covers:

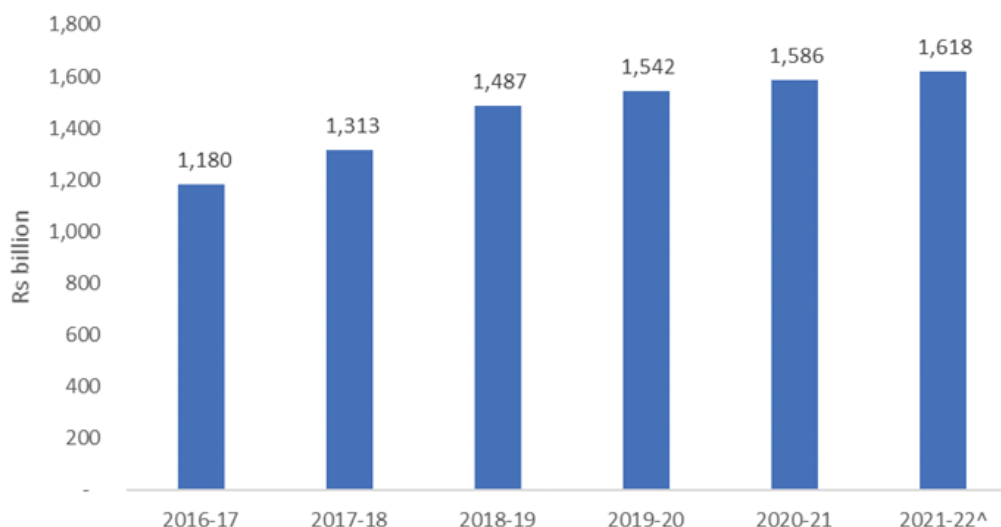
- ❖ Trends and developments in India's mining sector
- ❖ Analyses of key minerals in terms of production, demand, pricing etc.
- ❖ Detailed pipeline of upcoming mining projects (announced, awarded and under construction)
- ❖ Outlook and projections of key minerals
- ❖ Equipment market size and forecasts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

INDIA INFRASTRUCTURE RESEARCH

Report Summary and Key Insights

- The total value of mineral production (excluding atomic and fuel minerals) during 2020-21 has been estimated at Rs 1,585.89 billion, which is a y-o-y increase of 2.9% from Rs 1,541.55 billion recorded in 2019-20. During 2021-22 (till December 2021), the value of mineral production stood at Rs 1,617.57 billion.
- During 2020–2021, the total value of export of minerals stood at Rs 1,967 billion, registering an increase of 3.7% as compared to Rs 1,897 billion during 2019–2020. Meanwhile, the value of import of minerals registered a decline of 31.3% to Rs 7,913 billion in 2020-21 from Rs 11,515 billion during 2019–2020.
- Government of India has allowed 100% foreign direct investment (FDI) in the mining sector and exploration of metal and non-metal ores under the automatic route, which will propel growth in the sector. Further, 100% FDI is allowed in mining and mineral separation of titanium bearing minerals and ores, its value addition and integrated activities under government route. The share of mining in the overall FDI has declined over the past few years from 2.1% in 2014-15 to 0.2% in 2021-22 (till December 2021). During 2020-21, FDI inflow in Indian mining industry stood at USD 169 million, as against the high of USD 659 million in 2014-15.
- A total number of 145 mineral blocks have been auctioned till date from March 2015. Of these, 135 were mining lease and 10 were composite license. Of these, 37 mines were auctioned during 2021-22. At present, 95 more mineral blocks are in the pipeline to be auctioned during FY 2022-23. Of the minerals auctioned, the maximum were for limestone (53), followed by iron ore (47), bauxite (11), followed by other minerals.
- Auction of commercial mines on revenue sharing mechanism was launched on June 18, 2020. Till now, 4 tranches have been successfully completed and fifth tranche has recently been announced for commercial coal mining. A total of 47 coal mines have been successfully auctioned till date with a total cumulative PRC of 101.44 MTPA. Recently, the Ministry of Coal has put on offer 122 coal/lignite mines under the fifth tranche of commercial coal mine auction.
- The National Asset Monetisation Pipeline, as a part of the phasing plan up to 2024-25, has identified 160 coal mining projects with an overall monetization value of Rs 287.47 billion representing 5% share in overall NMP in value terms. Furthermore, about 761 mineral blocks have been identified for monetization.
- According to India Infrastructure Research, the pipeline of mining projects comprise of 392 key projects entailing an investment of at least Rs 2.20 trillion. About 55% of this investment pertains to greenfield projects, while the remaining 45% would be deployed in brownfield works. Projects under construction account for close to 40% of the total investment envisaged under the upcoming projects. Coal accounts for 70% of the total investment in upcoming projects.
- Most of the mining companies have outlined significant capital expenditure plans for the coming years. This is expected to be utilized towards expansion of existing mines or operationalising new mines. Some of the capex plans of key mining companies include capex of Rs 1.22 trillion up to 2023-24 by CIL, Rs 35 billion by NMDC during 2022-23, Rs 100-120 billion per year for the next five years by Tata Steel and \$1 billion by Hindustan Zinc in the next 5 years.

Year-wise value of mineral production



[^] Up to December 2021

Source: Ministry of Mines

Summary and Key Insights

SECTION I: SECTOR ANALYSIS, PROJECTIONS, AND OUTLOOK

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- ❖ SMASL
- ❖ JMS MSPL
- ❖ Montecarlo Mining Limited
- ❖ Dilip Buildcon Limited
- ❖ Aurobindo Reality and Infrastructure Private Limited
- ❖ Fairmine Carbons Private Limited
- ❖ Chowgule and Company Private Limited

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Contact details:

Raktima Majumdar

Senior Manager-Information Products
India Infrastructure Publishing Pvt. Ltd.,
B-17, Qutab Institutional Area, New Delhi - 110 016, India
Mobile: **+91 8826127521**
Email: majumdar.raktima@indiainfrastructure.com