



# **CEMENT & LIMESTONE**

**A Presentation**

**by**

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# INDIA - ON GROWTH PATH

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- It is a matter of great pride for all Indians to be part of country's development over the last 50 years, more so in the last 10 years.
- We are witnessing Industrial growth, adoption of newer technologies in agriculture sector, development in IT sector and lately emphasis given to the Infrastructure sector.
- Cement & Steel have played an Important role in infrastructure development of the nation.
- It is believed that this is only the beginning and we have to go a long way on this growth path to ensure each and every citizen of the country enjoys the fruits of development.

# OUR STRENGTHS

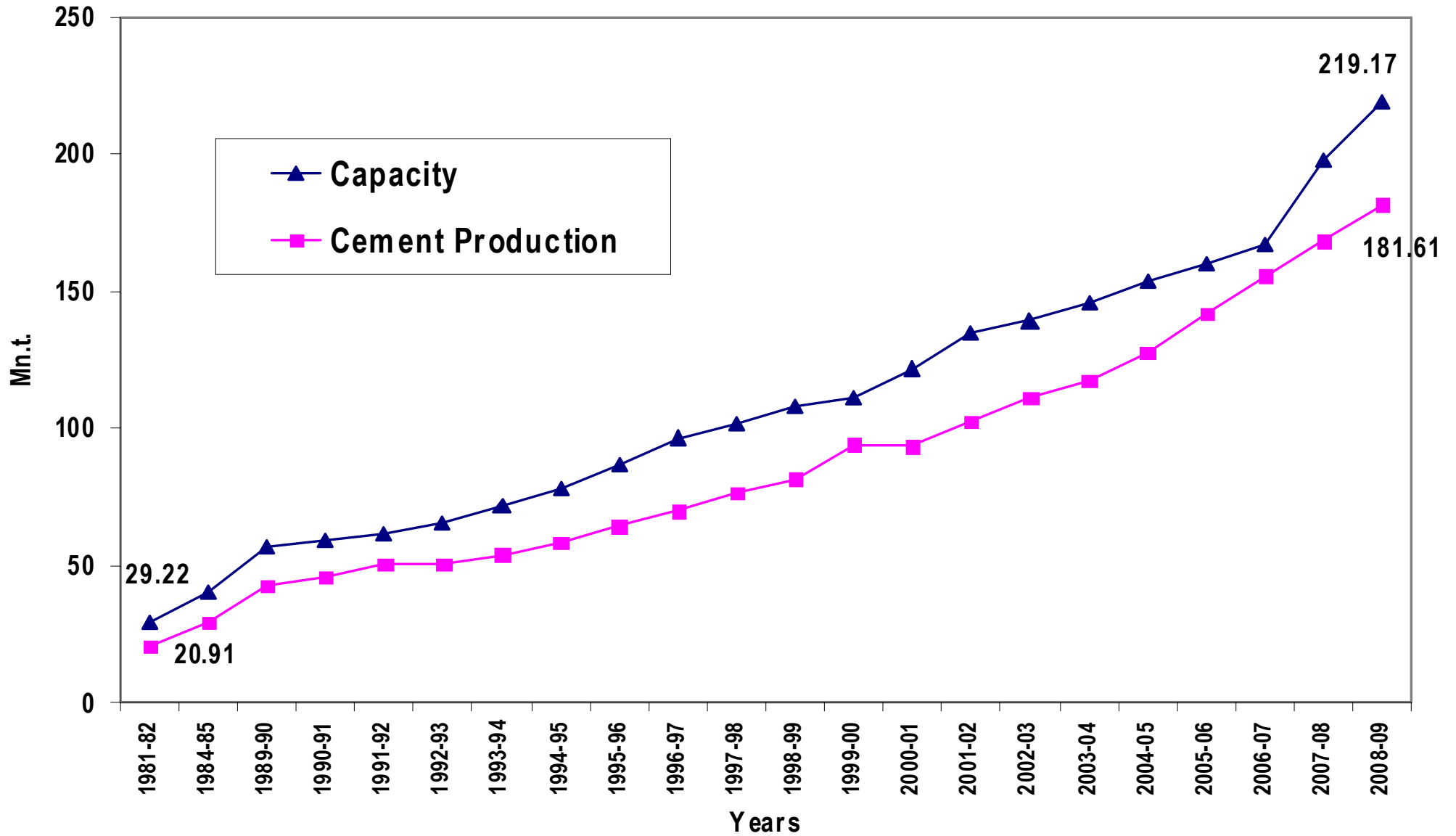
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- **Strong Cultural Base**
- **Human Resource with Large base of Educated & Skilled Manpower**
- **Strong Knowledge Base**
- **Vast mineral resources**
- **Willingness to Adopt and Pragmatic use of Newer Technologies**
- **Almost Self Sufficiency in Agriculture produce**
- **Large consumer base reducing dependency on Exports for our produce**

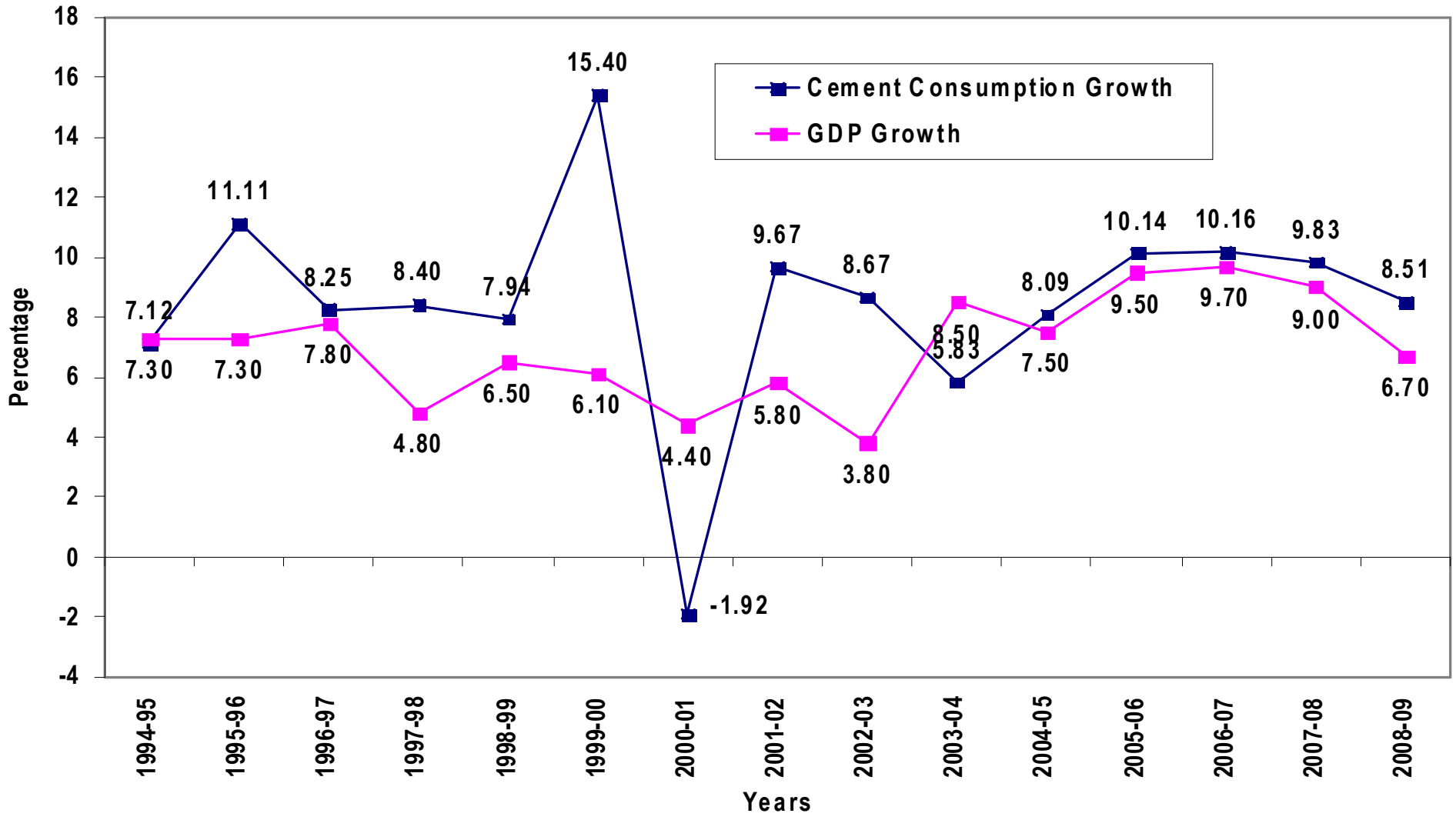
# CEMENT MANUFACTURING & LIMESTONE RESERVES

- India is the second largest cement producer in the world but still has per capita consumption about 150 as compared to world average of about 400 - A Huge Potential
- Pan-India cement manufacturing capacity is 258 Mn Tons per annum - An Exponential Growth over the last 4 to 5 years
- Cement consumption in the country has been growing @10% per annum in the last few years. This growth pattern is expected to be maintained
- Cement grade limestone, the main raw material for cement manufacture is abundantly available – Current Reserves are estimated at about 110,000 Mn Tons

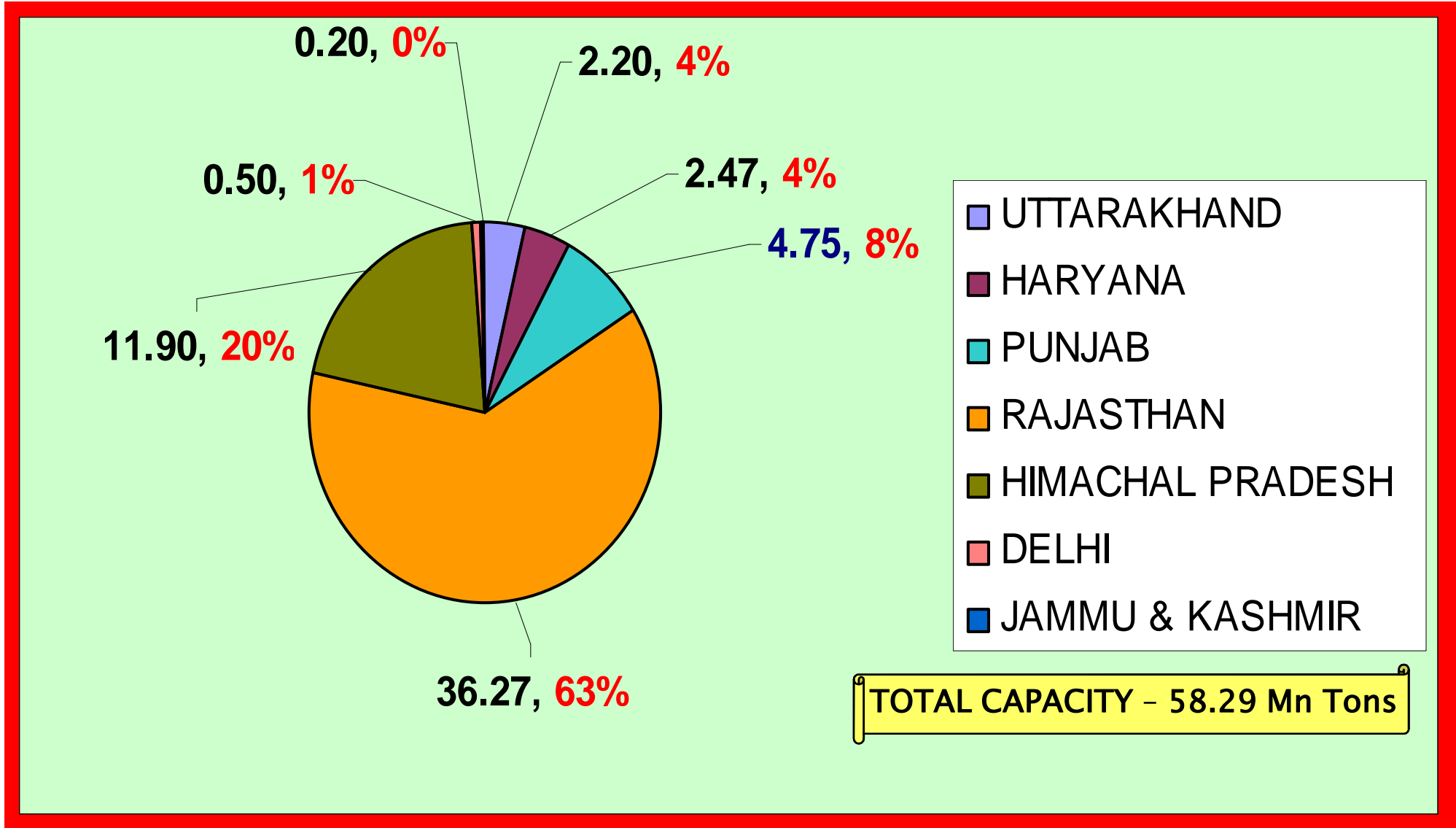
# GROWTH IN CEMENT INDUSTRY



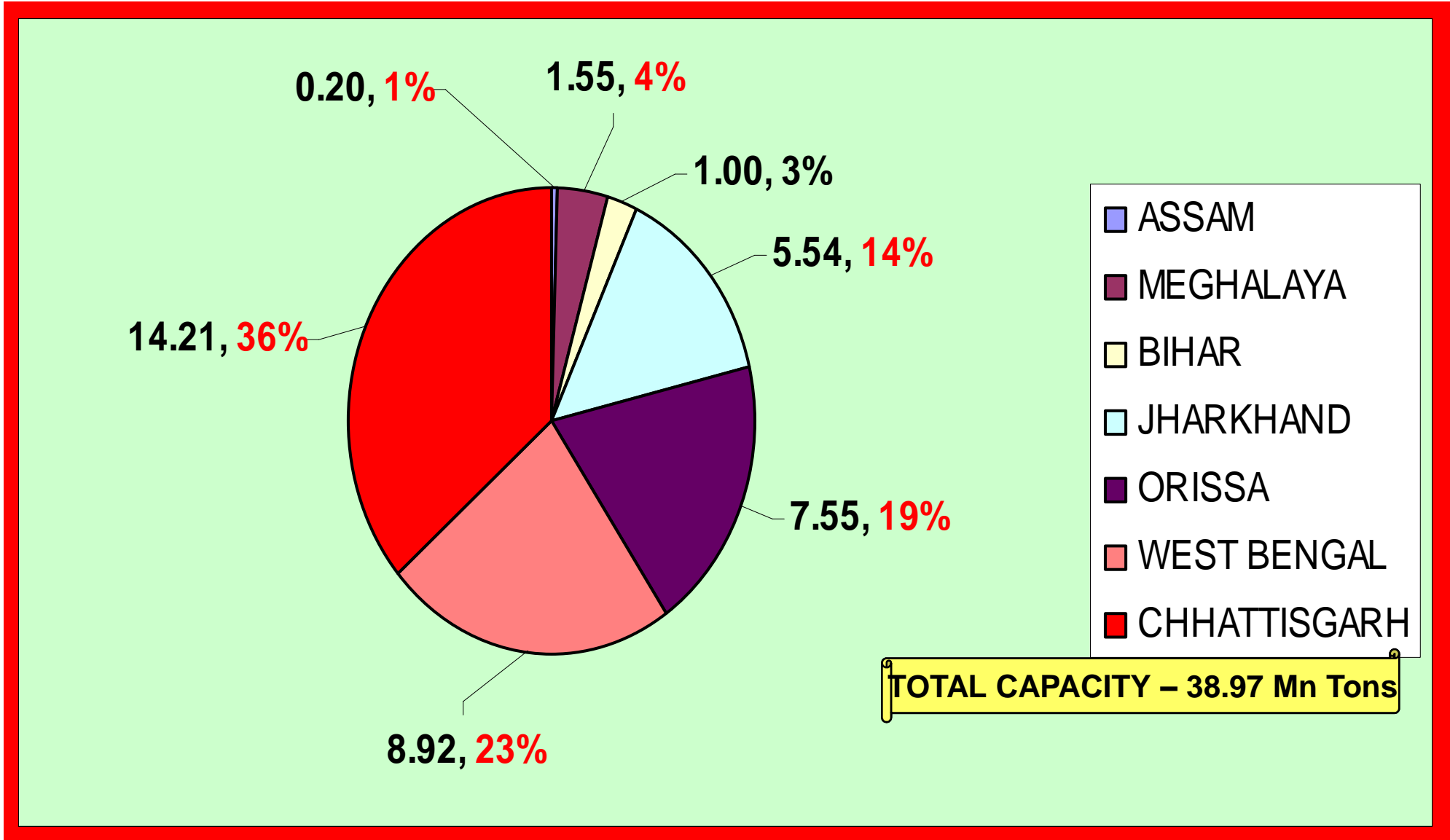
# GDP/CEMENT GROWTH



# CEMENT PRODUCTION CAPACITY - NORTHERN REGION

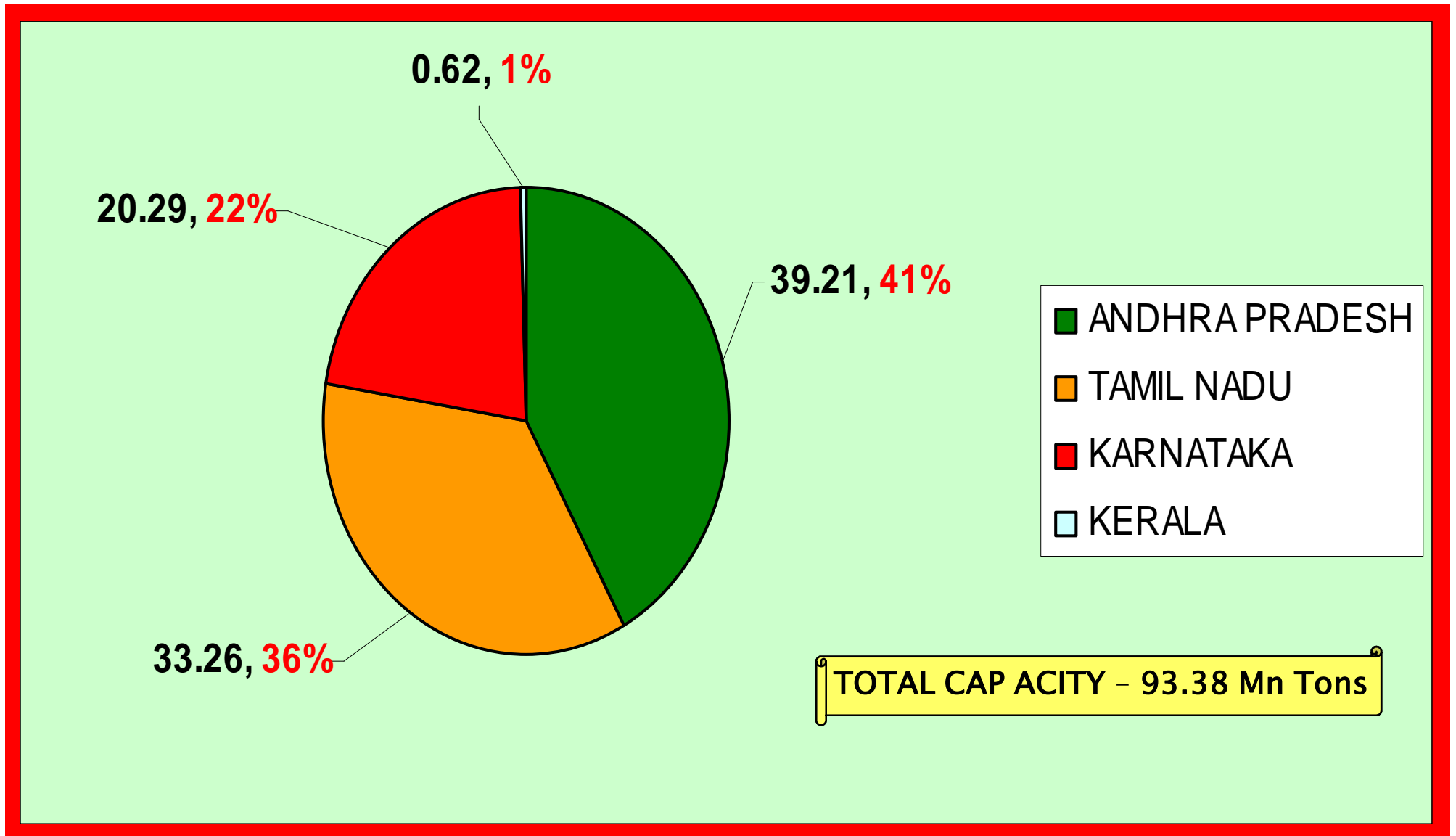


# CEMENT PRODUCTION CAPACITY - EASTERN REGION

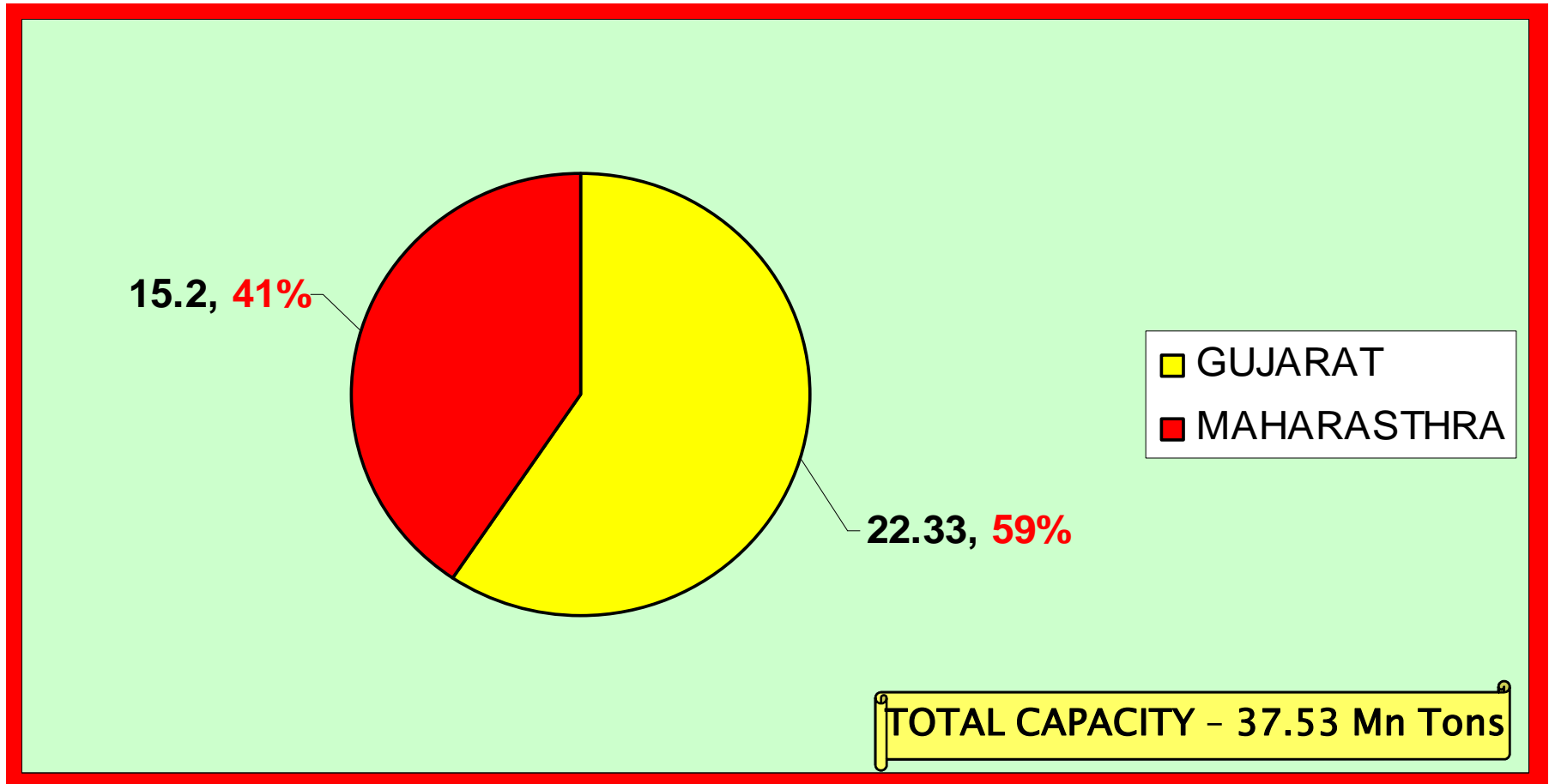




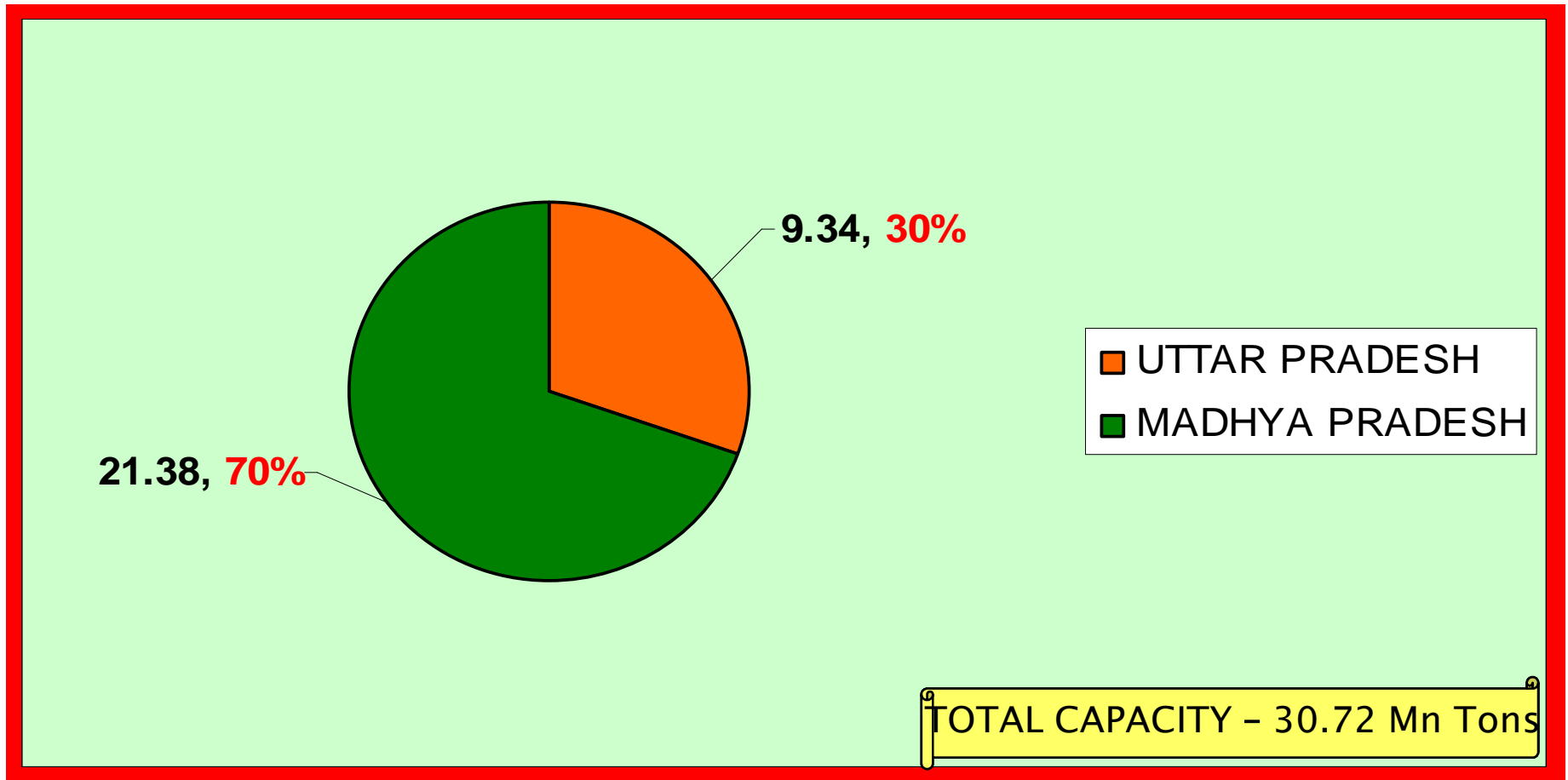
# CEMENT PRODUCTION CAPACITY - SOUTHERN REGION



# CEMENT PRODUCTION CAPACITY - WESTERN REGION



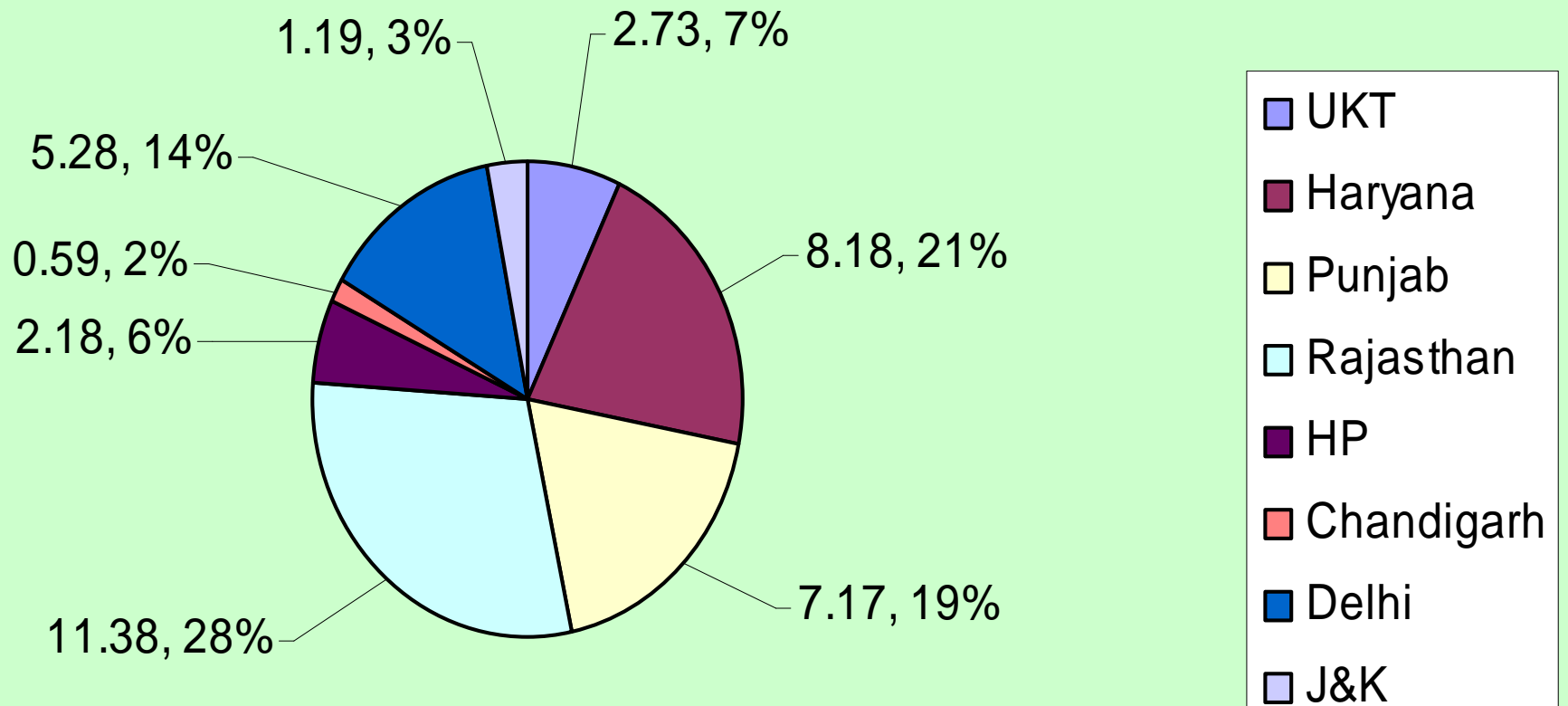
# CEMENT PRODUCTION CAPACITY - CENTRAL REGION



# CEMENT DESPATCHES - NORTHERN REGION



## Northern Region

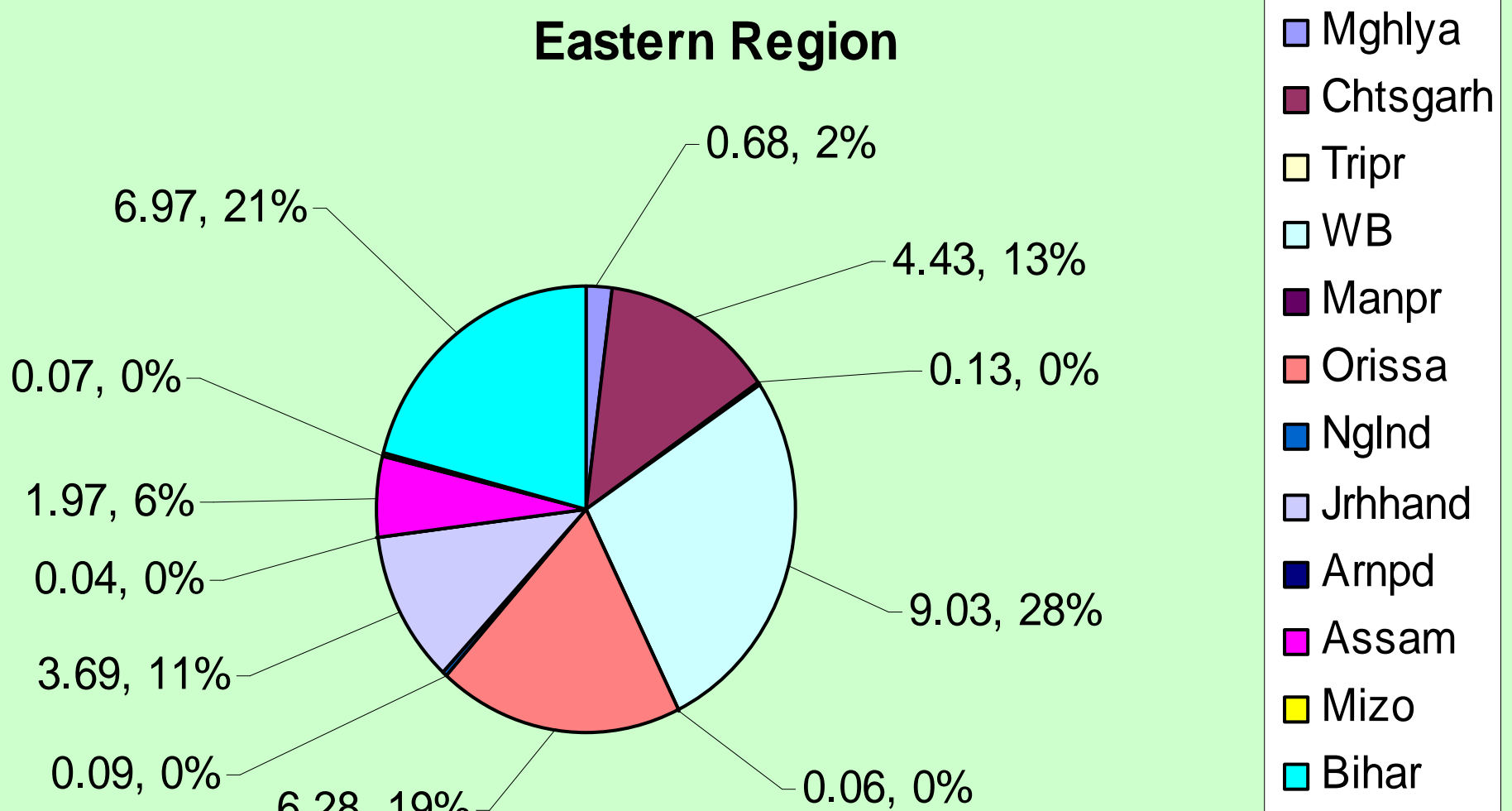


**TOTAL DESPATCH - 38.70 Mn Tons**

# CEMENT DESPATCHES - EASTERN REGION



## Eastern Region

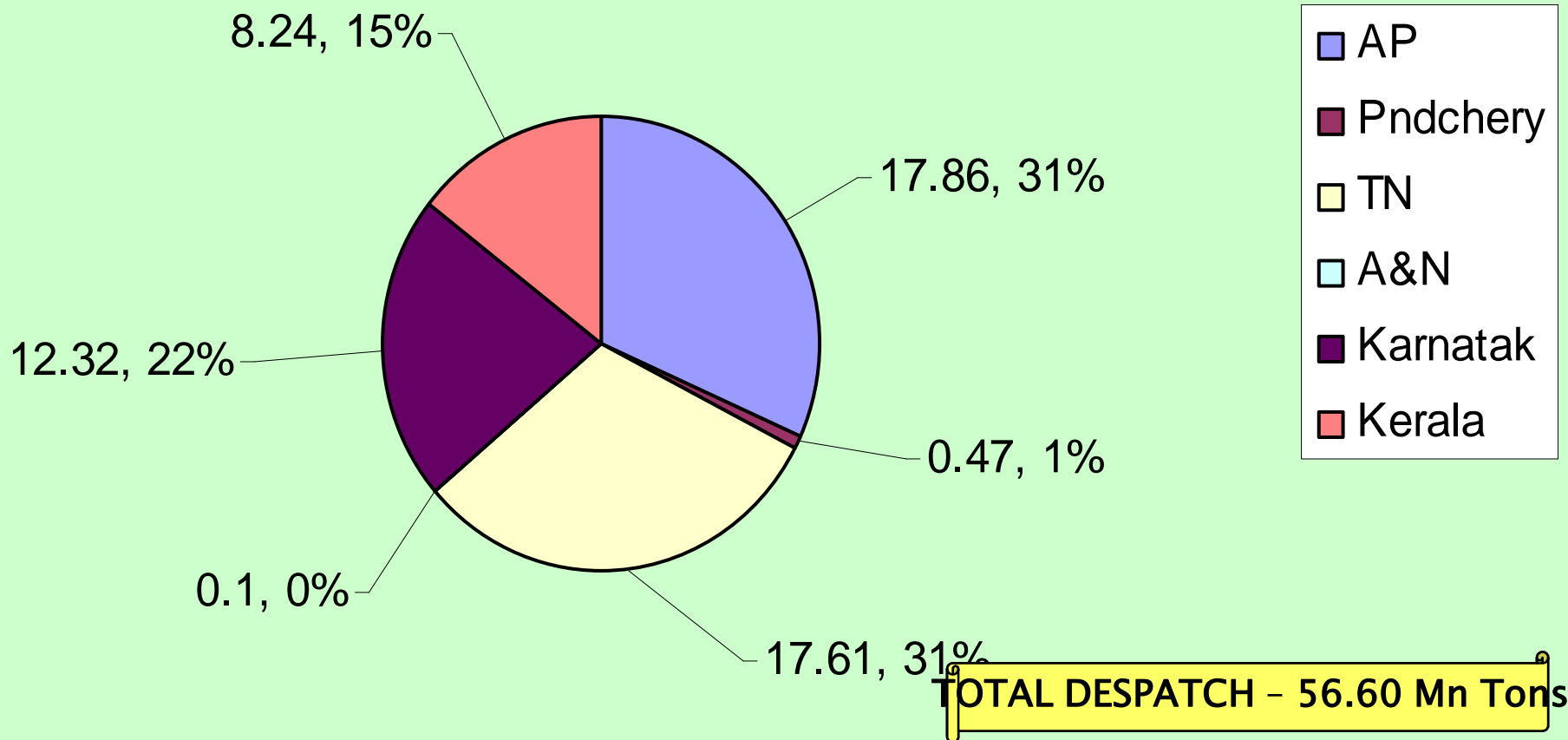


TOTAL DESPATCH - 33.44 Mn Tons

# CEMENT DESPATCHES - SOUTHERN REGION



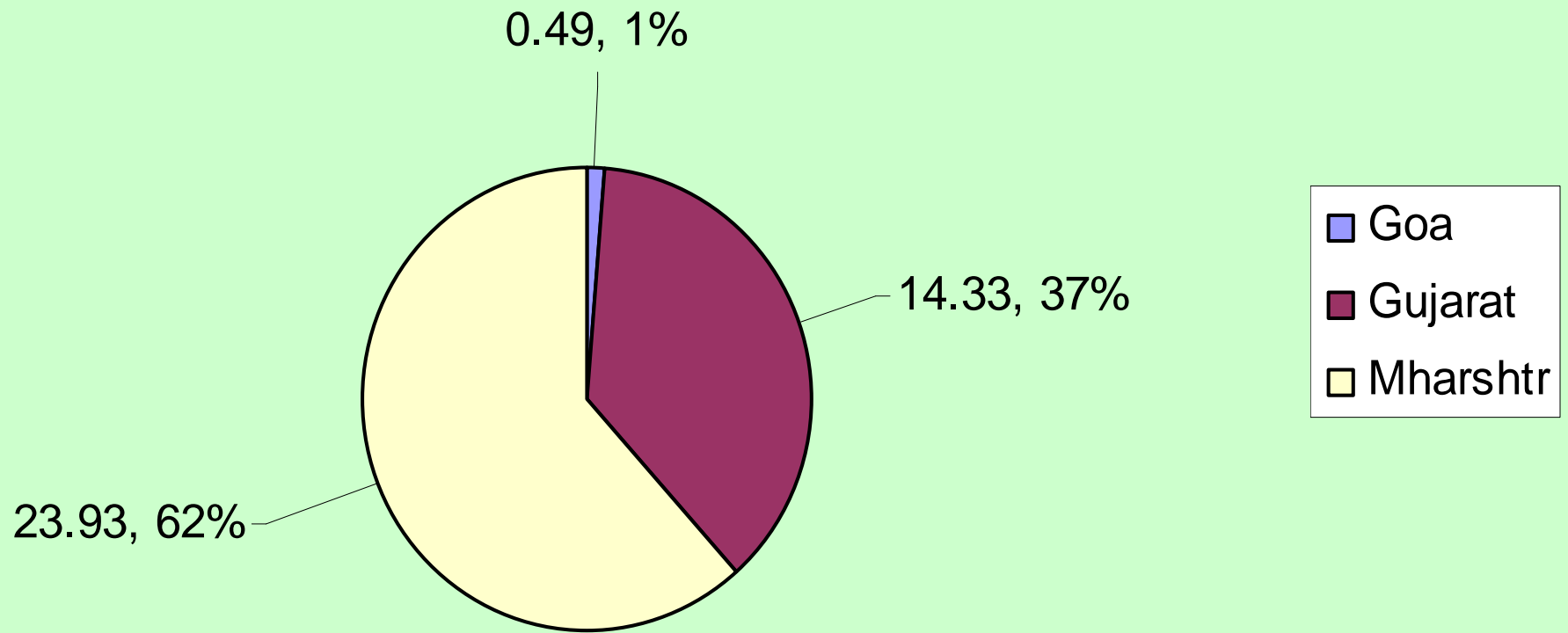
## Southern Region



# CEMENT DESPATCHES - WESTERN REGION



## Western Region

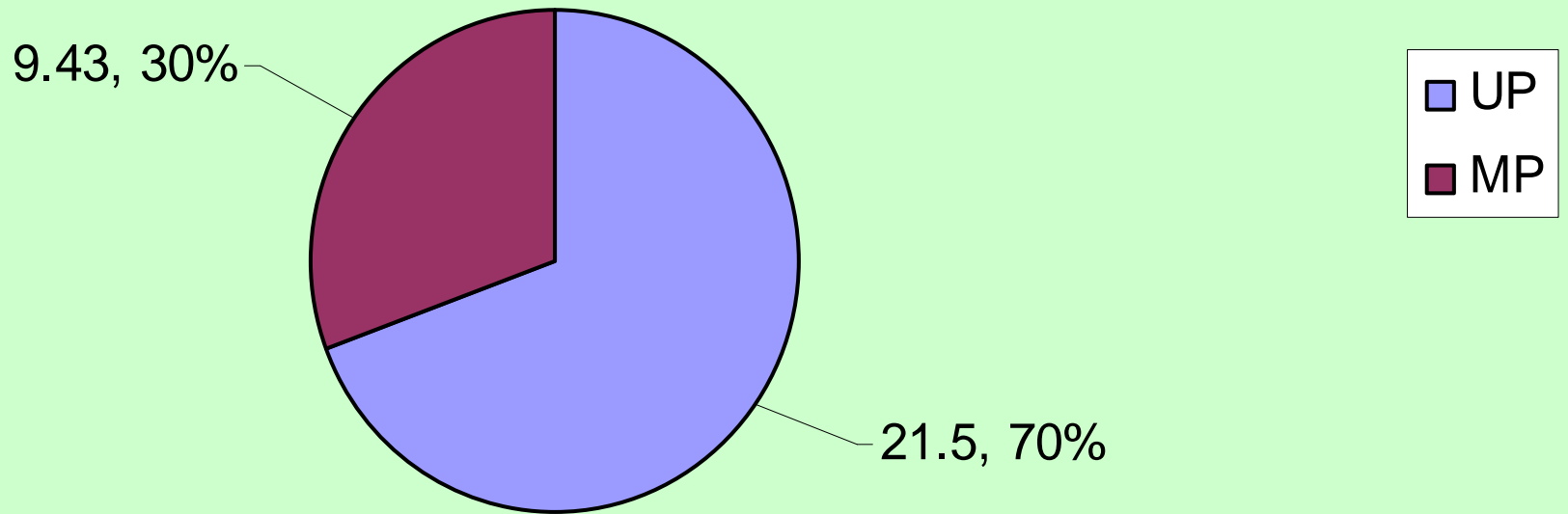


TOTAL DESPATCH - 38.75 Mn Tons

# CEMENT DESPATCHES - CENTRAL REGION



## Central Region



TOTAL DESPATCH - 30.92 Mn Tons



# CEMENT – ON GROWTH PATH

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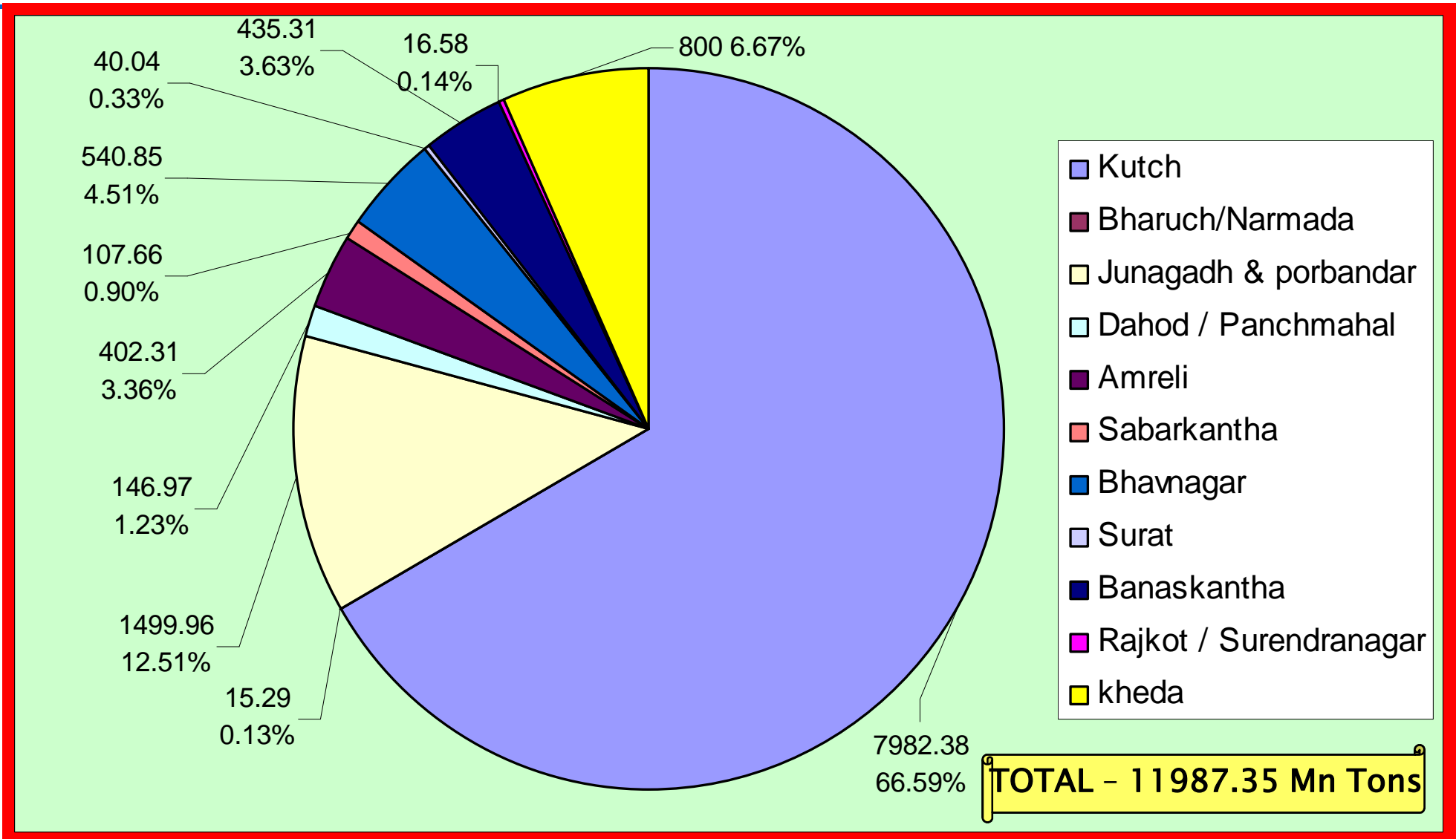
- ❑ Cement industry has shown over the last 4 to 5 years that it is able to meet the challenge posed by the added demand by building several green field & brown field projects and many of them are under implementation
- ❑ With the current growth rate, new capacity of about 20 to 25 Mn Tons per annum is expected to be added every year
- ❑ India's cement producing capability is expected to touch about 400 Mn. tons per annum over the next 5 years

# LIMESTONE RESERVES IN INDIA

➤ **Total Cement Grade Limestone Reserves are estimated at 110,907 million tons**

<b>➤ Zone – Wise Reserves :</b>	<b><u>Mn. Tons</u></b>
<input type="checkbox"/> <b>North</b> (Haryana, H.P.J&K, Rajasthan, Uttrakhand, U.P)	<b>34,775</b>
<input type="checkbox"/> <b>East</b> (Assam, Manipur, Meghalaya, Arunachal, Orissa, W.B., Jharkhand, Nagaland)	<b>9,571</b>
<input type="checkbox"/> <b>West</b> (Chhattisgarh, Gujarat, M.P., Maharashtra Diu)	<b>20541</b>
<input type="checkbox"/> <b>South</b> (A.P., Karnataka, Kerala, Tamilnadu, Andeman, Lakshdweep)	<b>46,019</b>

# LIME STONE RESERVES OF GUJARAT



Data : Mineral Treasure of Gujarat – published by commissioner of geology & Mining, Gandhinagar 2002

# GUJARAT – THE LAND OF OPPORTUNITIES

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	<u>Mn. Tons</u>
➤ <b>Cement Grade Limestone Deposit in the State (about 11% of Country's deposit)</b>	<b>: 12,000 (App)</b>
➤ <b>Cement Production Capacity (i.e. 8.6% of total capacity)</b>	<b>:22.33 Mn tpa</b>

# GUJARAT – THE LAND OF OPPORTUNITIES

- Gujarat is famous for turning challenges into opportunities and harness such opportunities to successful business ventures
- Gujarat has about 11% of lime stone reserves but has cement producing capacity of 8.6% of total Indian capacity
- The challenge is to harness the God given gift of substantial limestone reserves and use it for development of the State and the Nation
- Beside increasing cement usage within the State, creating /strengthening infrastructure it may act as a feeder State to other adjoining State
- Gujarat has a large coast line providing sea route access, optimizing logistics cost
- Good road network for on land transportation exist in the State however certain Limestone rich area need improved infrastructure
- Skilled & Educated man power is available in the State
- And the best of all Business-like Environment exists in the State

# SUGGESTIONS

- **Kutchh with vast Limestone and other mineral resources has potential to be developed into an Integrated Industrial City, with State of the Art Infrastructure facilities, equipped with a modern technology – perhaps a modern version of Jamshedpur**
- **The Industrial City could have large manufacturing base for Cement and Bauxite etc. based Industries**
- **A Residential Township with Commercial Complexes, Educational Institutions, Health Services and other support services will help in attracting professionals and entrepreneurs**
- **Power generation and Distribution network in the area. Thermal, Wind & Solar Power units are already under development in the area**
- **A centralized treated Water source for the Industrial and Domestic Use could be considered**
- **A comprehensive and consolidated Environment Impact Study could be instituted for the Integrated City to evaluate real consolidated effect on the environment. This may, perhaps help in getting Environment Clearances for the Projects from MoEF, at a faster pace**

# SUGGESTIONS

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**The State may consider the following for development of the Industrial City:**

- **Take up development through PP route.**
- **The State may treat the Integrated City under special Incentive Schemes towards:**
  - **Exemption / Deferment of Taxes & Duties**
  - **Support on Skill Development Programs of the Industry**
- **A real 'Single Window Concept' would help in expeditious implementation of the projects for:**
  - **Acquiring Land for the individual projects**
  - **Power**
  - **Water**
  - **Various Statutory clearances**

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• **THANK YOU**