

Lime Industry Report - 2014



Indian Lime Industry

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Topics	Page No
Chapter 1 – Lime Consumption – By Sectors	5 – 18
1.1 Overview of Lime/Limestone	5
1.2 Global Production - Lime	6
1.3 Global Industry Overview	7
1.4 India –Limestone – Reserves & Availability	8
1.5 Lime/Limestone – Reserves & Availability in India	9
1.6 Production of Limestone – By Sector & Grades	10
1.7 Production of Limestone – By Grades & States	11
1.8 India Limestone–By Grades/Production/States 2010-11 (Data in Graph)	12
1.9 India Limestone Reserves –By Grades/Production/States 2011-12	13
1.10 Reported Consumption of Limestone – By Industries	14
1.11 Reported Consumption of Limestone in Iron & Steel Industry By Principal Plants	15
1.12 Consumption of Limestone - By Industries	16
1.13 Foreign Trade of Limestone – Exports	17
1.14 Foreign Trade of Limestone – Imports	18
Chapter 2– Government Policies	19 – 21
2.1 Govt. Regulations & Policies	20
2.2 Indian Standard Definitions of Limestone & Lime	21
Chapter 3 – Mapping of Lime Supply and Demand	22 – 25
3.1 Mapping of India Lime Demand – By Sectors (Detailed Segmentation)	23
3.2 Mapping of India Lime Supply (Supply from Organized Sector /Unorganized Sector & Imports – Analysis)	24
3.3 India Lime Supply Chain (Analysis)	25

Topics	Page No
Chapter 4 – Overview of Lime Market	26 – 42
4.1 Consumption of Lime (Steel – BOF Route)	27
4.2 Consumption of Lime (Steel – EAF Route)	28 - 29
4.3 Consumption of Lime By Non Ferrous Industries – Data by Company Wise	30
4.4 Consumption of Lime By Soda Ash Industry – Data by Company Wise	31
4.5 Consumption of Lime By PCC Industry - Data by Company Wise	32
4.6 Lime Consumption – PCC Plants (in map)	33
4.7 Consumption of Lime By Other Industries – Leather/Paper/Construction/Textile/Agriculture/Sugar	34
4.8 List of Major Distributors	35
4.9 Demand & Supply Analysis	36
4.10 Demand Scenario (next 4 years)	37
4.11 Demand Scenario (next 10 years)	38
4.12 Upcoming Lime Demand – BF-BOF Route (Public Sector)	39
4.13 Lime Demand BF-BOF – Private Sector	40
4.14 Lime Demand EAF	41 - 42
Chapter 5 – Merchant Supply of Lime	43 – 48
5.1 Sourcing of Lime	44
5.2 Merchant Supply of Lime – BF-BOF Plants	45
5.3 Merchant Supply of Lime - EAF	46 – 47
5.4 Merchant Supply of Lime –Aluminum Plants	48
Chapter 6 – Lime Imports	49 – 54
6.1 India – Lime Imports	50

Table of contents

Topics	Page No
6.2 India –Lime Imports Average Price	51
6.3 India –Lime Imports (By Country Qty)	52
6.4 India –Lime Imports (Value by country)	53
6.5 India –Lime Imports (By Ports)	54
Chapter 7 – Captive Calcination Plants	55 – 59
7.1 Captive Lime Production	56 - 57
7.2 Upcoming Lime Kilns	58
7.3 Upcoming Lime Kilns – (Mapped)	59
Chapter 8 – Lime Conversion Cost	60 – 66
8.1 Lime Conversion Cost	61 - 64
8.2 Challenges in Captive Calcinations Plant	65
8.3 MNC operations in India	66
Chapter 9 – Lime Suppliers	67 – 79
Chapter 10 – Precipitated Calcium Carbonate	80 – 95
10.1 Precipitated Calcium Carbonate	81
10.2 PCC Suppliers	82 - 94
Chapter 11 – Recent Developments	95

Overview

With new stable government, India in the year 2014 is drawing bold future plans for manufacturing and infrastructure sector, which is likely to boost steel consumption and in turn **quicklime** industry. The demand for quicklime is set to grow from current 6.0 million tonnes to 9.0 million tonnes over the next 2 years.

We have observed in the past, that smaller companies tend to capture the market quickly with aggressive expansions in a boom market compared to larger players. Further smaller steel players have met their quicklime requirement from merchant players.

In the above scenario, we have come out with this **Lime Industry Report-2014** which captures consumption of quicklime across sectors through a country wide survey, the projected demand, current practices in lime procurement and challenges faced by consumers.

Key questions to be answered

1. What are the current practices of Lime/Limestone industry - imports vs. local sourcing ?
2. What is the percentage of lime/limestone consumed by steel sector vs. other industry ?
3. What is the benchmark consumption rates for lime/limestone for various production routes of steel ?
4. What is the total Lime/Limestone demand of Steel Sector in each route ?
5. How large /small players in steel sector are ensuring feedstock of lime/limestone and the scenario in the immediate term and in long term ?
6. What is the conversion cost of lime/limestone in a captive lime plant ?
7. What are the triggers and barriers in choosing technology, captive lime plants ?
8. Impending government policies, regulations, etc.



Sample Slides..

- Deep dive on Slide 9
- Deep dive on Slide 10 and 11
- Deep dive on Slide 12
- Deep dive on Slide 13
- Deep dive on Slide 16

India – Lime Demand

Sectors

Total Demand, million tpa

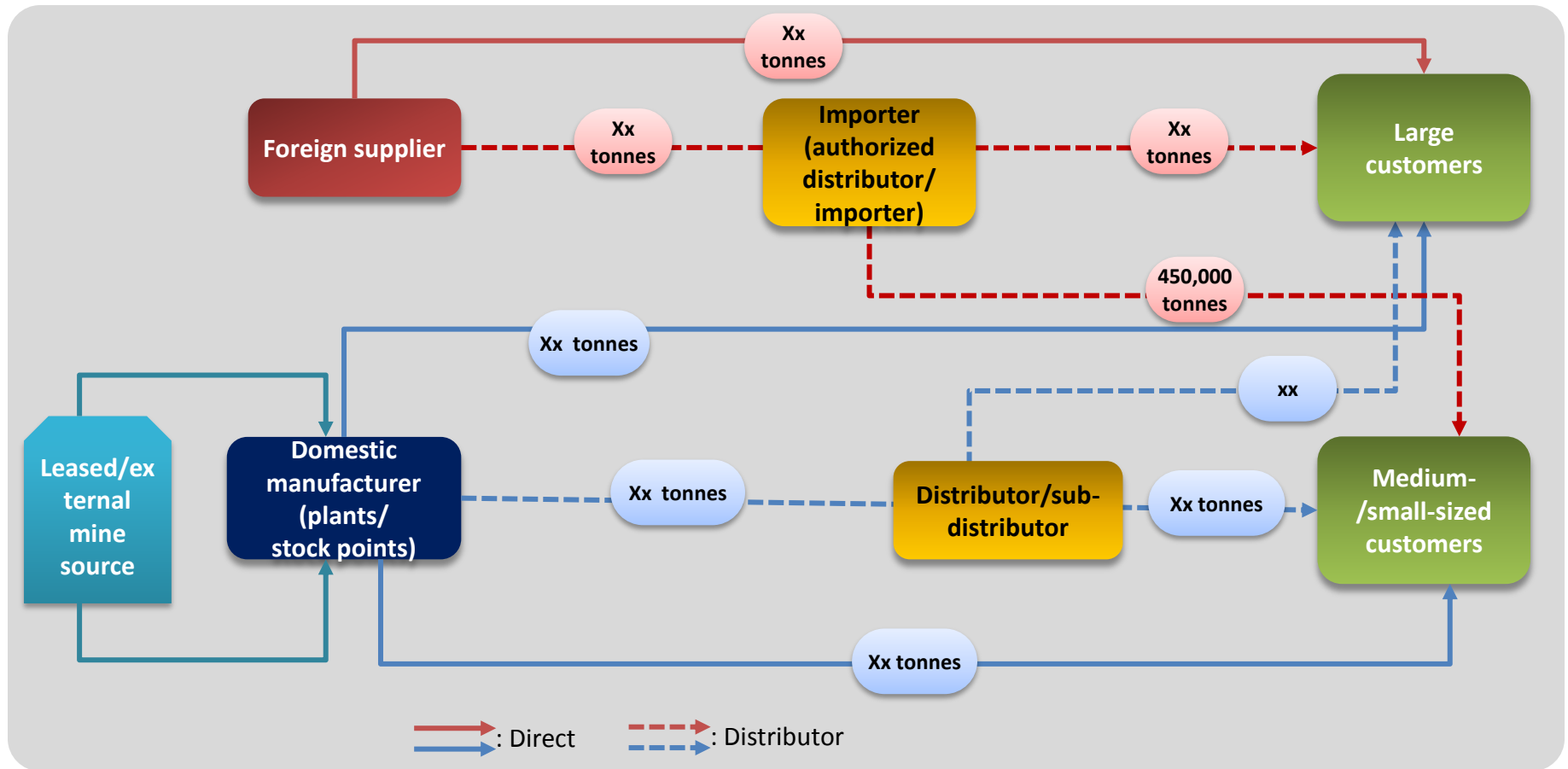
Metallurgical Industries	Ferrous Industries	BOF	X.XX	X.XX
		EAF	X.XX	
	Non-Ferrous Industries	Aluminum	X.XX	
		Copper	X.XX	
Zinc		X.XX		
Paper Industry				X.XX
PCC				X.XX
Chemical Industry	Soda Ash		X.XX	
	Calcium Carbide		X.XX	X.XX
	Others		X.XX	
Sugar				X.X
Building and Construction				X.X
Tanneries				X.X
Textile				X.X
Water and Sewage Treatment				X.X
Agriculture Sector				X.X
Total Lime Demand				XX.XX

India – Lime Supply

Total Supply, million tpa

	Captive	Merchant	
	BOF	x.xx	-
Captive Lime Production	EAF	x.xx ¹	x.xx
	Soda Ash	x.xx	-
	PCC	x.xx	x.xx
Unorganized Sector (approx 300 kilns in Rajasthan and another 50 kilns across India with capacity of 40-60 tpd produce 20000 tpd . Yearly Supply 6.5 million tonnes)			x.xx
Organized Sector (45 +players)			x.xx
Imports			x.xx
Total Lime Supply			x.xx

India - Lime Supply Chain



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