

Indian Industrial Explosives Industry Outlook to 2017 - Evolving Opportunities in Mining and Infrastructure

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Abstracts

EXECUTIVE SUMMARY

The report titled “Indian Industrial Explosives Industry Outlook to 2017 - Evolving Opportunities in Mining and Infrastructure” provides a comprehensive analysis of the various aspects such as market size of the industrial explosives industry in India by value and volume terms. The report also presents the market size of segments such as nitrate mixture including bulk, cartridge and ANFO based explosives, nitro compound including PETN and boosters and the gun powder in terms of volume. The report covers the market size of industrial explosives accessories in India such as safety fuse, detonators and detonating fuse.

India, a potential market for industrial explosives and its accessories, has witnessed a radical shift from complete import dependence in the past decades to self sufficiency with an exportable surplus presently. The Indian industrial explosives industry encompassed the activities related to the manufacturing and selling of industrial explosives in gun powder, bulk, cartridge and ANFO based explosives segments of the nitrate mixture, nitro compound including PETN and boosters and explosive accessories such as detonators, detonating fuse and safety fuse. The mining industry consumed around ~% of the industrial explosives manufactured in India with coal mining being the largest application of the explosives use in India.

The explosives industry in India has kept pace with the mining industry thus taking the market for industrial explosives in India to INR ~ crores in FY'2012 from INR ~ crores in FY'2006. The market in FY'2012, witnessed an incline of ~% of which coal and metal mining accounted for a strong growth. This growth can be mainly attributed to the increasing demand for coal, cement and electricity in the country thus driving the market

for explosives at a vigorous CAGR of 13.3% from the period FY'2006-FY'2012.

The production of industrial explosives in India has risen from ~ tonnes in FY'2006 to ~ tonnes in FY'2012. The mining contract business in India suffered in the last two years majorly due to the temporary closure of various iron ore and manganese ore mines of several major clients of the market leading to reduced production of industrial explosives in the last two years. The market for explosive nitrate mixture in India has been through several ups and down in the last few years. It grew at a CAGR of 3.5% during the period FY'2007-FY'2012.

The industrial explosives market is predominantly driven by the bulk explosives which comprises of ~% of the total industrial explosive market supply in FY'2012. During the period FY'2007-FY'2012, the production of cartridge explosives inclined from ~ tonnes in FY'2007 to ~ tonnes in FY'2012.

The Indian industrial explosives industry is concentrated with top 6 players contributing around ~% of the total revenue of the market in FY'2011. Solar Industries India Limited with the market share of ~% leads the industry due to company's successful project execution track record and a strong brand name in industrial explosives.

In FY'2012, safety fuse contributed around ~% to the total production of explosive accessories in India. However the contribution made by safety fuse has witnessed a downtrend since FY'2007 during which it contributed ~% to the overall production in the accessory market. On the other hand, detonators remain the leader in the market with its strong government regulations and policies in the country and rise in the usage in initiating an explosive charge with a contribution of ~% to the overall market of industrial explosives.

KEY TOPICS COVERED IN THE REPORT

The market size of the Industrial explosives market in India by value and volume.

The market size of Industrial explosives market segments such as nitrate mixture, nitro compound and gun powder.

The market size of the nitrate mixture segments such as bulk explosives, cartridge explosives and ANFO based explosives on the basis of production.

The market size of the industrial explosives accessories such as safety fuse, detonators and detonating fuse on the basis of production.

Consumption pattern of industrial explosives in India.

Trends and Development of the Industrial explosives industry in India.

Government regulations in Industrial explosives industry in India.

Market share of major players such as Solar Industries, Orica, Gulf Oil Corp, IBP Company, Premier Explosives, Keltech Energies Limited and others in the Industrial explosives industry in India and detailed company profiles of major players.

Future outlook and projections of Indian industrial explosives market size and segment wise projections of the nitrate mixture.

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