

# India Cement Industry Report - H1, 2013

<https://marketpublishers.com/r/I5388487C23EN.html>

Date: August 2013

Pages: 31

Price: US\$ 475.00 (Single User License)

ID: I5388487C23EN

## Abstracts

During the last five years, the Indian cement industry has shown resilience even amidst the global financial crisis. It is one of the eight core industries of the Indian economy. As of 2012, India was the second largest producer of cement in the world behind China. There has been a surge in capacity, consumption as well as production of cement during the last five years. However, per capita cement consumption in India is still amongst the lowest in the world. The vast potential that exists in the industry has attracted investors from all round the world. Three of the top four cement producers of the world have an established presence in India.

India's cement industry witnessed growth even amidst a grim economic situation in the country in FY13. The demand supply gap that existed in the sector has allowed the cement companies to stay profitable. Housing and government spending on infrastructure were the major drivers of growth for the industry. Although the installed capacity has increased in the past few years, the cement companies of India were not able to utilize it to full extent. The industrial slowdown and consequent moderation in demand for cement resulted in a lower capacity utilization for the industry in the last four years. Furthermore, the rising cost of production brought the operating margins of Indian cement companies under pressure at the end of FY13.

However, the long term outlook for Indian cement industry is positive owing to a steady growth in housing and infrastructure development. Domestic consumption is expected to drive growth and expansion in the industry.

### Key Points:

Government spending on infrastructure has been a major source of growth for the sector. As of FY12, the investment in infrastructure was at 8.37% of GDP. This figure is projected to grow to 10.70% of GDP by the end of 12th Plan period

(2012-2017).

During 2006-2012, the annual cement consumption in India grew at a CAGR of 10%. In FY13, the consumption grew by 9.5% year on year, recording a recovery after witnessing a tepid 7.1% year on year growth in FY12. Government spending was one of the main drivers of this recovery.

During 2008-2013, the country's installed production capacity increased at a CAGR of 12.1%. However, the addition in capacity did not result in a corresponding increase in production and demand. Hence, the industry's capacity utilization has declined in the last four years.

During 2008-2013, the production index for eight core industries recorded a CAGR of 4.9%. Cement industry outperformed the overall growth by recording a CAGR of 7.6% during the same period. In FY13, while the overall production index recorded a 1% year on year growth, cement industry recorded a year on year growth of 9%.

## Contents

### 1. INDUSTRY PROFILE

- 1.1 Sector overview
- 1.2 Sector size
- 1.3 Competitive landscape
- 1.4 Environmental scanning

### 2. MARKET TRENDS AND OUTLOOK

- 2.1 Key economic indicators-India
- 2.2 Installed capacity
- 2.3 Cement production
- 2.4 Cement consumption
- 2.5 Cement trade
- 2.6 Cement prices and realization
- 2.7 Industry forecast

### 3. LEADING PLAYERS AND COMPARATIVE MATRIX

- 3.1 Leading players
  - 3.1.1 Ambuja Cements Ltd
  - 3.1.2 UltraTech Cement Ltd
  - 3.1.3 India Cements Ltd
- 3.2 Comparative matrix
- 3.3 SWOT analysis

### 4. TABLES & CHARTS

- Table 1: World cement consumption statistics
- Table 2: Recommendations of the working group for the growth of cement industry
- Table 3: Balance sheet parameters
- Table 4: Valuation matrix
- Chart 1: Index of industrial production
- Chart 2: Breakup of world cement production by countries
- Chart 3: Size of the Indian cement industry
- Chart 4: PAT margin of Indian cement companies
- Chart 5: Market share of cement companies in terms of production

- Chart 6: Position of constituent parties in lower house of parliament
- Chart 7: Projected investment in infrastructure as a percentage of GDP
- Chart 8: Quarterly GDP growth rate-India
- Chart 9: Average monthly USD to INR exchange rate
- Chart 10: Inflation during FY13-India
- Chart 11: Y/Y change in Index of industrial production
- Chart 12: GDP by sectors at factor prices
- Chart 13: Percentage change over previous year- GDP by Sector
- Chart 14: Annual Installed capacity of cement industry
- Chart 15: Breakup of installed capacity by company
- Chart 16: Total annual cement production
- Chart 17: Annual capacity utilization
- Chart 18: Total annual cement consumption in India
- Chart 19: Annual cement demand as a ratio of installed capacity
- Chart 20: Cement consumption by sector
- Chart 21: Cement consumption by region
- Chart 22: Cement exports from India
- Chart 23: Breakup of Indian cement exports by countries
- Chart 24: Monthly wholesale price index for limestone
- Chart 25: Monthly wholesale price index for gypsum
- Chart 26: Monthly wholesale price index for grey cement
- Chart 27: Operating margins of major cement companies
- Chart 28: Realization of cement producers
- Chart 29: Forecast for cement consumption in India
- Chart 30: Ambuja Cements-Shareholding
- Chart 31: Net sales of ACL and ACC
- Chart 32: EBIDTA margins of ACL and ACC
- Chart 33: UltraTech Cement-Shareholding
- Chart 34: Annual production of UltraTech Cement
- Chart 35: Net sales of UltraTech Cement
- Chart 36: Profit margins of UltraTech Cement
- Chart 37: UltraTech Cement-Shareholding
- Chart 38: Annual production of India Cements
- Chart 39: Net sales of India Cements
- Chart 40: Profit margins of India Cements

## I would like to order

Product name: India Cement Industry Report - H1, 2013

Product link: <https://marketpublishers.com/r/I5388487C23EN.html>

Price: US\$ 475.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/I5388487C23EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970