

India Metals Industry Report - H2, 2013

<https://marketpublishers.com/r/IBE699A2F95EN.html>

Date: December 2013

Pages: 36

Price: US\$ 475.00 (Single User License)

ID: IBE699A2F95EN

Abstracts

This report covers the structure, trends, and outlook of India's metals and minerals sector through H2 2013. The report also offers profiles and a comparative matrix of leading players in the sector, including Hindalco Industries, Hindustan Zinc, and Hindustan Copper.

India's metals and minerals sector has been an important constituent of economic growth in India. The country has been a major global player in minerals and metals in terms of manufacturing, consumption and trading in the last few years. India was the world's fifth-largest aluminum producer as of 2010 and sixth-largest zinc producer as of 2009. The sector comprises mining, production and trading companies and the big metals players dominate the industry, thus forming a sort of oligopoly.

The first half of FY2013 was difficult for the sector after a domestic industrial slowdown lowered demand. The global situation for metals and minerals was also adverse, with spot prices of several metals going south. However, the prices of metals started showing signs of growth in the third quarter of the fiscal year, backed by the improved economic outlook in the United States, European Union, and China. The sector will remain under pressure in the near term due to a demand slowdown and sticky inflation. However, the outlook for the sector is stable in the long term because of low per capita metal consumption, vast mineral resources, and a growing construction sector. Reforms and clearances in the mining sector will further add to this growth.

Key Points:

This report discusses the market position of and financial information for several of the sector's leading players, including Hindalco Industries Limited (HIL), Hindustan Zinc Limited (HZL), and Hindustan Copper Limited (HCL).

The value of the metallic minerals segment was estimated at around INR 434bn at the end of FY13. During FY09-13, the segment grew at a CAGR of 16%, while the non-metallic minerals sector, which was valued at INR 344bn, grew at a CAGR of 18%.

Total aluminum production during the first six months of FY13 was around 756 thousand tons. Contrary to the consistent growth achieved in the last five years, total production in H1 FY14 declined by 11% over H1 FY13.

Total copper production during the first six months of FY14 was around 248,000 tons. This was 33% lower than production over the same period in FY12.

In H1 FY14, the mining index contracted by 2.5%, while non-metallic mineral products grew by 1.1% on a y/y basis. Meanwhile, the basic metals index contracted by 2.5%. Thus, all three segments underperformed in the first half of FY14 compared to their historical growth rates.

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 Minerals
 - 2.2.1 Metallic minerals
 - 2.2.2 Non-metallic minerals
 - 2.2.3 Minor minerals
- 2.3 Metals
 - 2.3.1 Aluminium
 - 2.3.2 Copper
 - 2.3.3 Zinc
 - 2.3.4 Other metals
- 2.4 Global prices

3. LEADING PLAYERS AND COMPARATIVE MATRIX

- 3.1 Leading players
 - 3.1.1 Hindalco Industries Limited (HIL)
 - 3.1.2 Hindustan Zinc Limited (HZL)
 - 3.1.3 Hindustan Copper Limited (HCL)
- 3.2 Comparative matrix
- 3.3 SWOT analysis

4. TABLES & CHARTS

- Table 1: Major metallic, non-metallic and minor minerals in India
- Table 2: Key financials of major metal players (non-ferrous) of India
- Table 3: Key features of MMDR bill
- Table 4: Production and value of major metals produced in India
- Table 5: Key financial ratios of the leading players

- Chart 1: Size of various segments of mining industry in India
- Chart 2: Size of metallic minerals and non-metallic minerals sector
- Chart 3: FDI in Indian metallurgical industries
- Chart 4: Current account deficit and fiscal deficit
- Chart 5: Changing demographics of India
- Chart 6: Quarterly GDP growth rate-India
- Chart 7: Average Monthly USD to INR Exchange Rate
- Chart 8: Inflation during FY14-India
- Chart 9: Y/Y change in index of industrial production-FY13
- Chart 10: IIP-Sectoral (Annual)
- Chart 11: IIP-Sectoral (Monthly y/y change)
- Chart 12: Total value of mineral production
- Chart 13: Share of states by value of mineral production
- Chart 14: Share of metallic minerals (ores) by value
- Chart 15: Annual production of metallic minerals
- Chart 16: Share of non-metallic minerals by value
- Chart 17: Annual production of non-metallic minerals
- Chart 18: Share of minor minerals by value
- Chart 19: Share of states by value of minor mineral production
- Chart 20: Annual production of major non-ferrous metals
- Chart 21: Annual capacity and production of aluminium during last five years
- Chart 22: Share of production capacity of aluminium in India
- Chart 23: Aluminium production in the country
- Chart 24: Breakup of aluminium production by companies
- Chart 25: Annual capacity and production of copper
- Chart 26: Share of production capacity of copper in India
- Chart 27: Copper production in the country
- Chart 28: Breakup of copper production by companies
- Chart 28: Breakup of copper production in the country
- Chart 29: Annual capacity and production of zinc
- Chart 30: Share of production capacity of zinc
- Chart 31: Zinc production in the country
- Chart 32: Breakup of zinc production by companies
- Chart 33: Annual capacity and production of lead
- Chart 34: Share of production of gold in India
- Chart 35: Commodity metals price index monthly price
- Chart 36: S&P/TSX global mining index
- Chart 37: Aluminium monthly price
- Chart 38: Zinc monthly price

- Chart 39: Gold prices- London afternoon fixing
- Chart 40: Breakup of company's revenue by segments
- Chart 41: Sales of Hindalco Industries
- Chart 42: Profit margin of Hindalco Industries
- Chart 43: Hindustan Zinc segments by sales value
- Chart 44: Sales of Hindustan Zinc
- Chart 45: Profit margin of Hindustan Zinc
- Chart 46: Copper production by HCL
- Chart 47: Net sales of Hindustan Copper
- Chart 48: Profit margin of Hindustan Copper

I would like to order

Product name: India Metals Industry Report - H2, 2013

Product link: <https://marketpublishers.com/r/IBE699A2F95EN.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

Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/IBE699A2F95EN.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