

Demand Outlook on Mining Equipment Market in India 2020: (What 1 billion tonnes of coal production by 2019 means for mining equipment market in India?)

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Abstracts

Despite been known as a country with one of the largest coal reserves in the world, India is struggling to match the coal demand supply equation, resulting in power crisis in the country. From 100 million tonnes in 2012, India's coal imports are slated to touch 220 million tonnes by 2016, making it one of the largest coal importing countries in the world. So what exactly is going wrong, given that the country is sitting on reserves of over 100 billion tonnes, adequate to meet the demand for atleast next 70-80 years? The answer is Operational Inefficiency in Coal India Ltd (CIL) mining operations, which is mainly on account of low level of mechanization in the industry. It is anticipated that Coal India's improvement in efficiency will come only when the coal sector is opened for commercial mining because that is when Coal India will see its competitors in the mining space and that will force certain amount of market, certain amount of improvements under market pressure. Coal India Ltd (CIL) lags international peers in productivity despite having a high proportion of open-cast mines

The share of UG mines in India is far below the global average, once the mainstay of coal production in India; the contribution of UG mines in total production has declined to 7% in the past four decades of nationalization. Between 1975 and 2014, CIL's UG production came down from 70 million tonnes to 36 million tonnes, lower than the spot sales of 54 million tonnes in 2013-14. Although past few decades have seen quantum jump in the level of Mechanization in Opencast Mining in India, not much progress has happened in Mechanized Underground Mining; UG mining continuous to use board and pillar method as against long wall / continuous mining technology. UG mines contribute 20% of production in Australia, ~40% in the US and 90% in China. China has maintained focus on underground mining as it results in less pollution than open cast mining. Between 2005 and 2013, China ramped up thermal coal production from 2.3

billion tonnes to 3.6 billion tonnes. This was done while consolidating smaller coal mines to improve efficiency, resulting in average mine productivity soaring almost three-fold.

India seems to be accelerating its effort to transform the ailing coal sector in India. The Government has announced plans to boost Coal India's annual production to the level of 1 billion tonnes by 2019 and this requires significant investment in mechanization of existing mines and fast tracking mine development activity in newer mines. In order to achieve the government vision, the new chairman of CIL has also clearly indicated that his strategy would be to improve mine productivity through technology upgradation in opencast mines with induction of high capacity equipment. In underground mines, continuous miner technology will be leveraged in large scale, long-wall technology at selected mines, man riding system in major mines and use of tele monitoring techniques.

As the government successfully auctions captive coal blocks to private & public sector, and CIL goes full throttle in ramping up its production capabilities, demand for coal mining equipment is likely to witness exponential growth. In order to quantify what the 1 billion coal production target means for the mining equipment OEMs, InfraInsights is pleased to launch its market research report ""Demand Outlook on Mining Equipment Market in India 2020"". The intent of the report is to provide a detailed analysis of what the current mining market size is and how it is likely to grow by 2020. This report will be very useful resource for all mining equipment OEMs active in India or those planning to capitalize on the emerging multi-billion opportunity in India market. The report will be delivered entirely through primary research and will be provide data & insights useful to take informed decision on India market strategy pertaining to mining equipment market in India.

Contents

1. COAL MINING INDUSTRY IN INDIA

- a. Background
- b. Market composition & key players
- c. Privatization
- d. Coal mining and India's GDP
- e. Domestic Coal Production by Mine Category
- f. Opportunities & Challenges

2. KEY REGULATIONS & POLICIES IN COAL MINING INDUSTRY

3. MINING EQUIPMENT MARKET LANDSCAPE

- a. Mining Equipment technology and its classification
 - i. mine excavation equipment
 - ii. underground transportation equipment
 - iii. mineral washing and screening equipment
- b. Current Technology & Trends
- c. Key business stakeholders
- d. Application matrix

4. MATURITY OF COAL MINING INDUSTRY IN INDIA

- a. Level of mechanization in Coal India mines
 - i. Underground Mining
 - ii. Open cast mining
- b. History of long wall mining in India
- c. Operational Efficiency
- d. Automation in mining industry in India
- e. Comparison with Indonesia & Australia

5. FACTORS THAT WILL DRIVE MECHANIZATION & WHY MECHANIZE

- a. Key drivers
 - i. Coal India to produce 1 billion tonnes by 2019
 - ii. Private participation in mining sector
 - iii. Auction of captive mines

- b. Why mechanize - Business Case
 - i. Cost comparison of IPCC Vs Truck Dispatch System in OC mine
 - ii. Cost comparison of board and pillar method vs long wall mining

6. MINING EQUIPMENT MARKET (DRILLING AND BLASTING, HAULING, LOADING, TRANSPORTING & PROCESSING)

- a. Market characteristics
- b. Companies geographical spread
- c. Market size in 2014-15: By value and volume
 - i. Production - Exports + Imports = Domestic Market
- d. Market size in 2014-15 by companies - by value and volume
- e. Market size in 2014-15 by equipment type - by value and volume
- f. Market size in 2014-15 by Open Cast (OC) & Underground (UG) Mining - by value and volume
- g. Market size in 2014-15 by end users - Government mines vs. Private mines
- h. Market size in 2014-15 by regions
- i. Product pricing & commercial practices
- j. Marketing & Distribution practice
- k. Market trends
- l. Companies new initiatives & development
- m. Companies future plans
- n. Past & future growth trends

7. PROJECTED DEMAND FOR COAL MINING EQUIPMENT IN INDIA BY 2020

- a. Drilling & Blasting
- b. Hauling
- c. Loading
- d. Transporting & Process

8. PROCUREMENT PLAN OF MINING COMPANIES

- a. Aging of mining equipment in CIL
- b. SECL, WCL, BCCL and others
- c. Private companies

9. RETROFITTING / REFURBISHMENT OPPORTUNITY

10. COMPETITIVE LANDSCAPE

- a. Overview
- b. Key Public Sector Companies
- c. Key Private Sector Companies
- d. Key MNCs

11. DETAILED COMPANY PROFILING

- a. L&T
- b. GMMCO
- c. BEML
- d. Terex Vectra
- e. Volvo

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