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Cement Industry in India 2021

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Abstracts

The cement industry is mainly driven by the consequential number of construction activities with the growing demand and a surging need for residential complexes of urbanised population. Furthermore, the construction of various infrastructure projects such as airports and roads, undertaken by the government in recent times, propels the growth of the market. Some of the major players include UltraTech Cement Limited, Ambuja Cements Limited, ACC Limited, Shree Cement Limited.

Market insights:

India is the second-largest producer of cement in the world, accounting for more than 7% of the global installed capacity. In FY 2021, domestic production stood at 294.40 million tons, declining by 12% year-on-year on account of the economic slowdown. Cement consumption is projected to reach about 419.92 million tons in FY 2027. The spurt in demand from sectors such as housing, commercial construction, and industrial construction will lead to an increase in consumption.

Segment insights:

The housing sector is the key contributor to the cement industry growth. It is estimated that about 60% of cement is consumed by the sector. Demand is further getting fuelled by the non-trade segment, which is gaining momentum with the resumption of construction work of public infrastructure projects such as roadways and metros, after the lockdown. In terms of production, south India has the maximum production capacity among the five zones (north, south, central, west, and east). It has a share of about 33% of the overall cement production.

COVID-19 impact analysis:

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In the wake of the pandemic, production was affected due to intermittent lockdowns and restrictions on mobility. Construction activities were interrupted in Q4 FY 2021 and Q1 FY 2022 because of the second wave and this resulted in the decline of consumption. However, because orders were put on hold, consumption volumes increased in the second quarter of FY 2022. Significant market growth is expected over the forecast period because of higher infrastructure and developmental activities.

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